PEOPLEADMIN

USER GUIDE

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OVERVIEW

What is PeopleAdmin?

PeopleAdmin is a recognized leader in Talent Management solutions specifically designed for Higher Education and Government. They help their customers build better organizations to build a better future. The company's unique web-based solutions enable organizations to: automate and streamline the hiring process; improve candidate communication; efficiently manage position descriptions; develop compliant and defensible audit trails to defend talent management decisions; and utilize industry-leading reporting and metrics. More than 700 organizations rely on PeopleAdmin to strengthen and simplify their talent management process. (http://www.peopleadmin.com)

Initial Set-up of user Accounts

Although the system gives you the option to request a user account, it is recommended that all user accounts be created by Human Resources (HR). Please do not attempt to open an account on your own. When you are ready to begin using PeopleAdmin, please contact Human Resources and a representative will create an account for you.

1. At the initial setup, you will be assigned a username. The username will always follow the following format: first six letters of last name, first two letters of first name, all lowercase, all together as one word. For example, if your name is Amy Johnson, your username will be "johnsoam." The username must always have eight characters so, if your last name does not have six or more letters, then extra letters will be taken from your first name to meet the character requirement. For example, John Smith's username would be "smithjoh."

2. Your initial password will be the same as your username. However, upon initial login to the system, you will be prompted to change the password once again, this time, to something of your choosing.

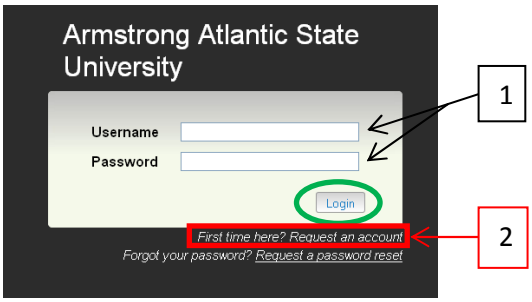
3. The Human Resources representative will also assign you to a specific group based on your position. This grouping will dictate the various user privileges, levels of access (e.g. manage, delete, create, update, or view), features and capabilities which you will have access. The user privileges in the system that will be granted to you will provide access to the tasks that are relevant to your work. The set of privileges associated with your particular group are called group permissions. Each set of group permissions specifies which position types can be accessed. For example, if you have a group permission that does not apply to faculty searches, you will not be able to see any information associated with a faculty search while you are signed in using your group permission. The most commonly assigned groups are Dean/Director, Hiring Manager, Search Chair, and Search Committee Member.

When the process of creating the user account is complete, PeopleAdmin will email you a welcome to the program to get you started by reminding you of your username and password and giving you the web address to access PeopleAdmin.

GETTING STARTED

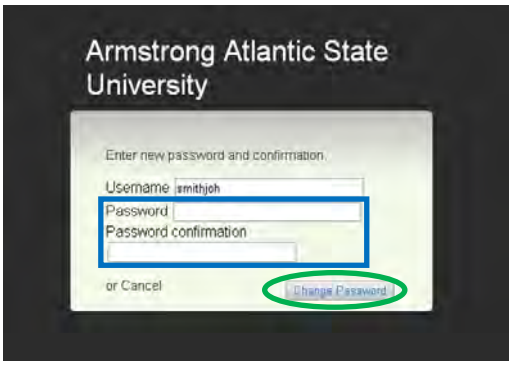
Logging In

Jobs.armstrong.edu/hr



1. Type your username and password into the designated spaces and click "Login." This will take you to your homepage within the PeopleAdmin program.

> ☆**Helpful Tip for FIRST TIME USERS:** You will need to complete step one above with the information that HR provided to you. However, once you enter this information, you will be prompted to reset your password.



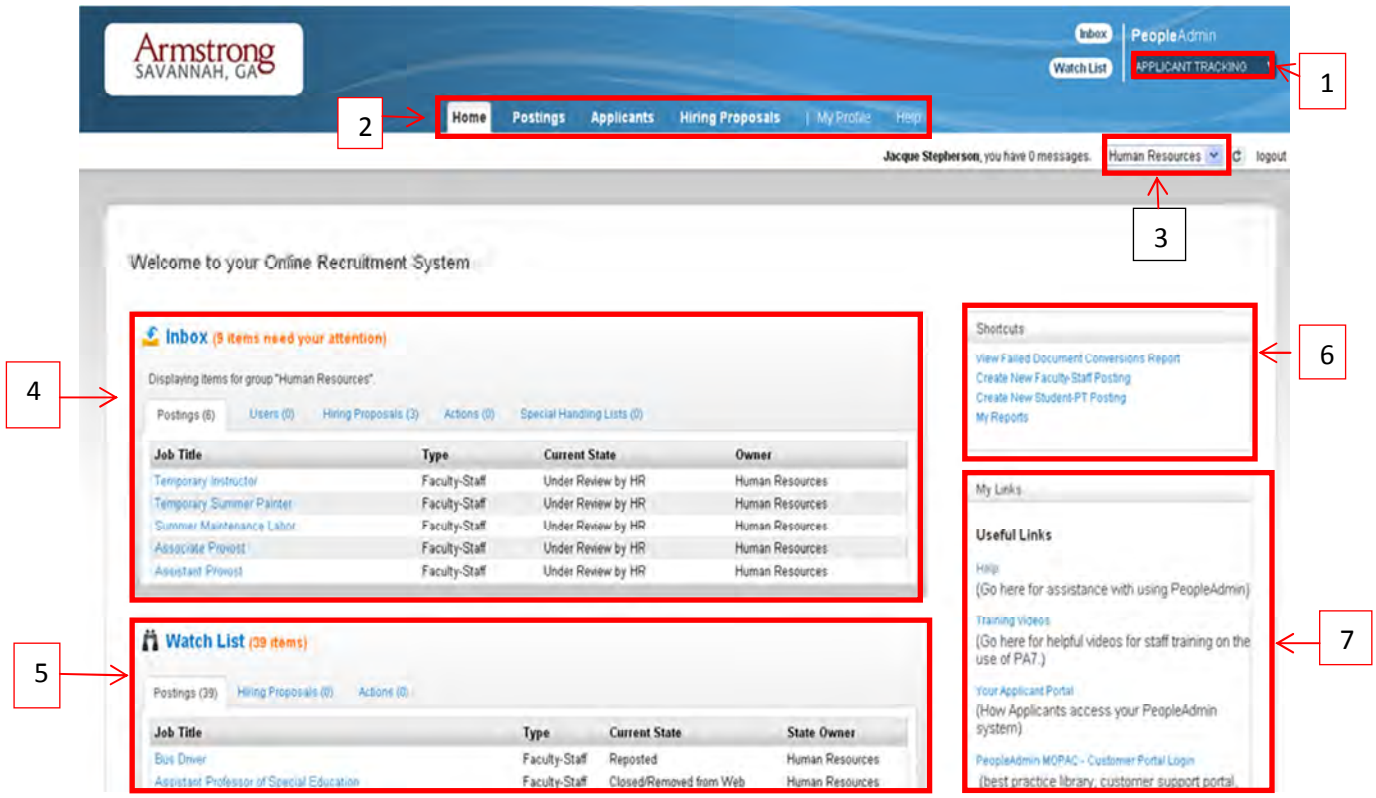
- Your username should automatically appear in the "username" field. If it does not, simply type it into this field.
- Enter your desired password into both the "Password" and "Password confirmation" fields.
- click "Change Password."

*Once your password is reset, you will then be directed to the homepage.

2. On the initial login screen, you will notice that there is an option for you to click on "First time here? Request an account." **Although the system gives you this option, it is recommended that all user accounts be created by Human Resources. Please do not attempt to open an account on your own.**

3. If you have misplaced or forgotten your password, contact Human Resources and a representative will reset it for you.

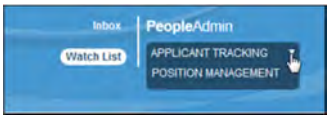
NAVIGATING THE HOMEPAGE



1. Platforms

There is a drop down menu that will allow the user to navigate between the different pages or "platforms" within the product. These pages correspond with the tasks you will need to complete. Upon logging in, you will automatically land on the "Applicant Tracking" page. This platform includes the information and functions necessary for managing postings, applicants, and hiring proposals. The other page option is "Position Management." This platform houses all the information on position descriptions and titles.

In order to switch between these pages, hover over the arrow with your mouse and select the desired page.



2. Applicant Tracking

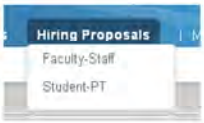
Along the top of the homepage there are several tabs. The tabs that you see will depend on which platform you are currently in.

In the "Applicant Tracking" platform, the following tabs appear:

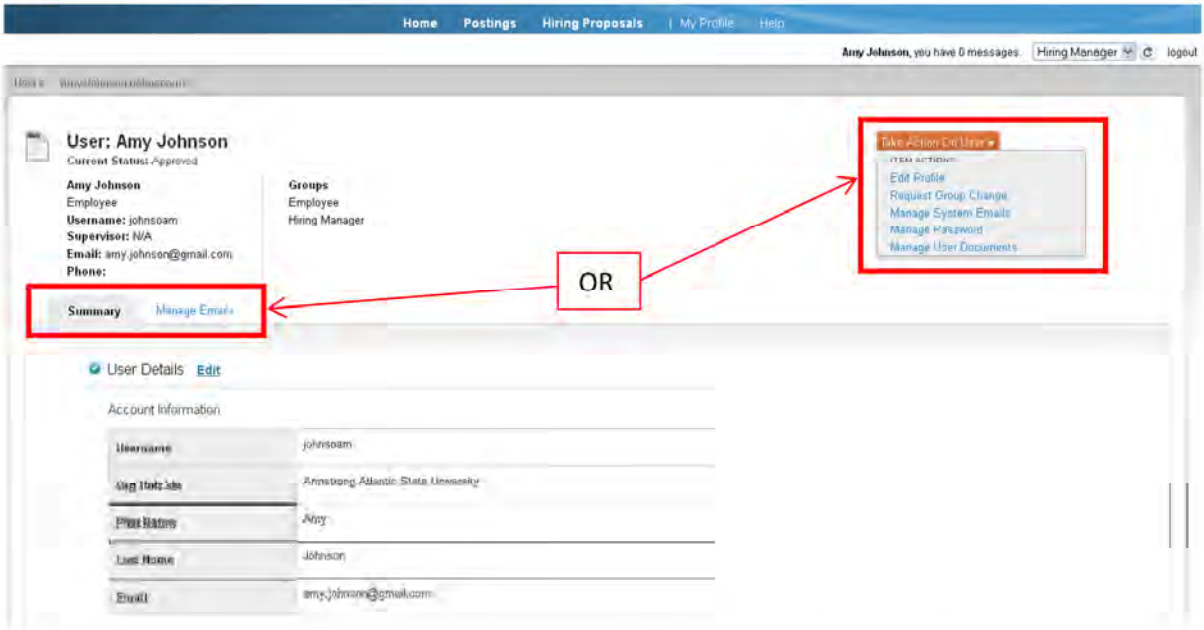
The **HOME** tab is the page that you will see immediately after logging in. If you are on any other page in the program, clicking this tab will bring you back to the homepage.

The **POSTINGS** tab allows you to search existing postings and create new ones. If you hover over this tab, you will see that it is divided into "Faculty-Staff" and "Student-PT." Selecting one of these options will narrow down the pool of results based on the type of position you are interested in searching or creating.

The **HIRING PROPOSALS** tab allows you to search outstanding hiring proposals. You will be able to keep up with the state of the hiring proposals for any and all positions for which you are the hiring manager. This tab is also divided into "Faculty-Staff" and "Student-PT," giving you a quick way to narrow your search.



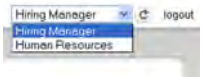
The **MY PROFILE** tab stores all of your relevant information as an employee, such as your username, email address, supervisor name, and groups of which you are a member on the system.



To make changes to your user profile, you can either use the "Summary" and "Manage Emails" tabs or hover over the "Take Action on User" button. You have the option of simply editing the information on your profile, requesting a change in your assigned groups (which would require approval from Human Resources), managing emails (i.e. setting preferences for which types of system messages you want to be sent to the email account on file), managing your password (i.e. making any desired changes to your password), or managing user documents (i.e. uploading any documents that you would like to include on the postings you create).

3. Groups

If you are assigned to multiple groups, you can switch between them to access the corresponding functions for each group.



To change the group, click on the drop down menu next to your name and select the group that you want to work under.

> Helpful Tip: Be sure the click the **"Refresh** ↻ **"** button to ensure that the program has completed the requested function.

*Note: If there is a green message response at the top of the screen, then the system has successfully performed the function.

*Note: If there is a red message response at the top of the screen, then some error occurred. The message will tell you what the problem is and usually how to fix it.

4. Inbox

The inbox is where any items that require action on your part can be found. This includes items that are specifically assigned to you in their current workflow state. Your inbox does not include items that are currently assigned to other people. You should receive an email notification if a message is in your Inbox, but it is a good idea to monitor this area periodically in case you miss a notification.

5. Watch List

This area allows you to keep an eye on postings that are relevant to your department or postings that you are interested in tracking. It allows you to follow the progress of any items that matter to you, even if they are owned by other users. The Watch List displays where the posting is in the workflow and the current owner of that workflow state. You can also choose to stop watching an item at any time.

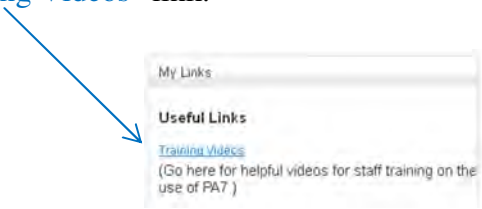
6. Shortcuts

Shortcuts (which are tied to user group permissions) take you to pages that you use most often (i.e. "Create New Faculty-Staff Posting" and "Create New Student-PT Posting").

7. My Links

This area is also based upon user group permissions. The links will take you to PeopleAdmin Training Videos, Armstrong's Applicant Portal, and Help.

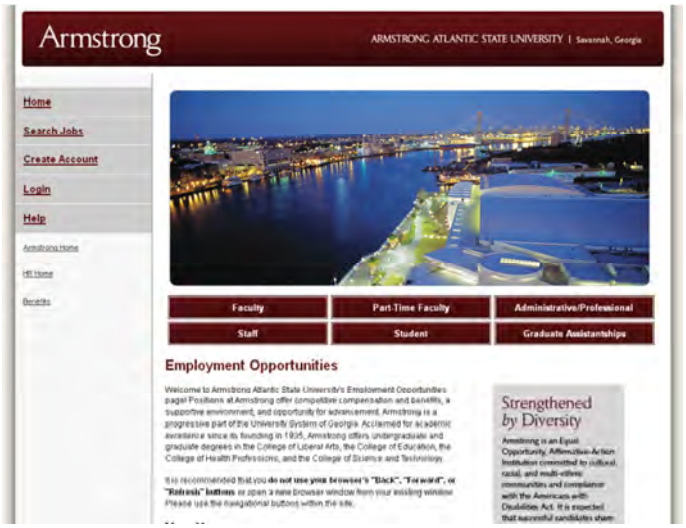
a. **Training Videos** - This link will take you to helpful videos for faculty and staff training on the use of PeopleAdmin. It is highly recommended that you watch the "End User Training Videos." To access these tools, click on the "Training Videos" link.



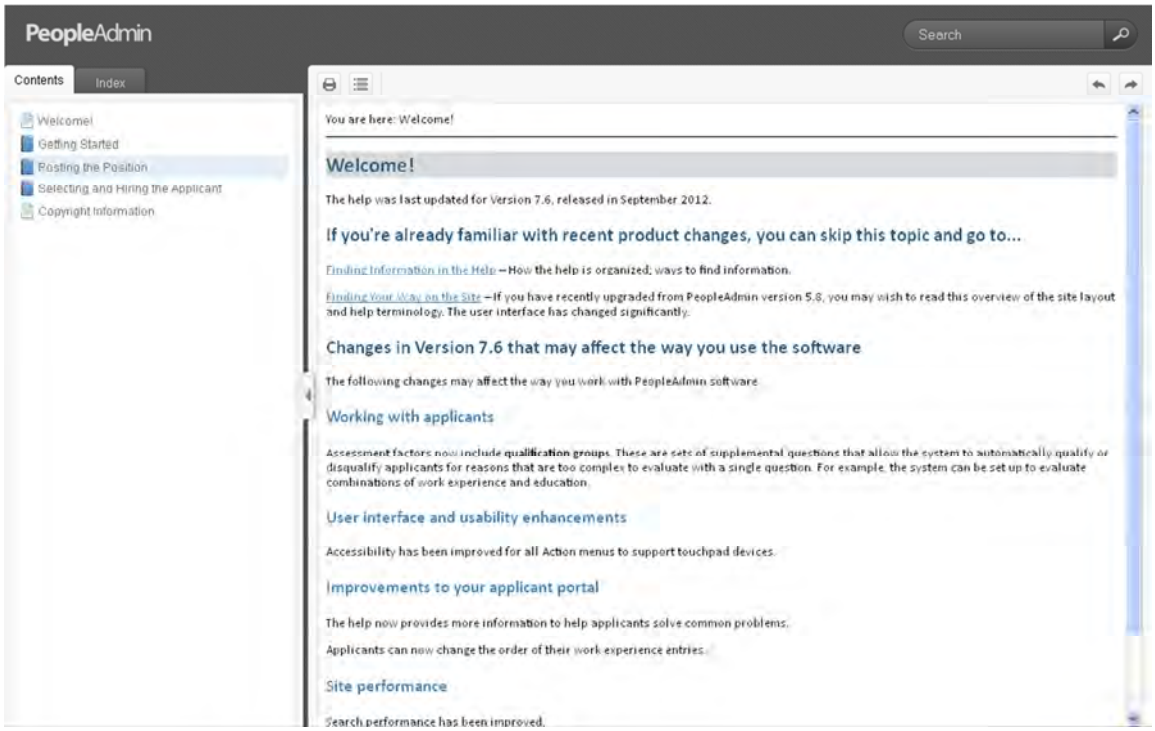
The system will automatically direct you to the page displayed below. From here you can select and watch the training videos.

PeopleAdmin
My Online PeopleAdmin Connection
Home
Search...
PeopleAdmin End User Training Videos
View the following videos to get up and running quickly with your most common Applicant Tracking and Position Management tasks.
Use the controls at the bottom to view the video full screen, adjust the volume, and navigate within the video.
Applicant Tracking Training
Learn how to use the Applicant Tracking module to assist you in the hiring process.
Position Management Training
Learn how to build and maintain your position description library.
Hiring Proposal Training

b. **Your Applicant Portal** - This link redirects you to Armstrong's employment site where individuals can search for jobs and submit their applications. This is how applicants access the PeopleAdmin system.



c. **Help** - This link opens a new window with help information on selected topics. This is also a useful tool for general questions about PeopleAdmin. The welcome screen for the "Help" link is shown below. You can click on the various links provided or search for specific questions.


PeopleAdmin
Search
Contents
Index
Welcome!
Getting Started
Posting the Position
Selecting and Hiring the Applicant
Copyright Information
You are here: Welcome!
Welcome!
The help was last updated for Version 7.6, released in September 2012.
If you're already familiar with recent product changes, you can skip this topic and go to...
Finding Information in the Help – How the help is organized; ways to find information.
Finding Your Way on the Site – If you have recently upgraded from PeopleAdmin version 5.8, you may wish to read this overview of the site layout and help terminology. The user interface has changed significantly.
Changes in Version 7.6 that may affect the way you use the software
The following changes may affect the way you work with PeopleAdmin software.
Working with applicants
Assessment factors now include qualification groups. These are sets of supplemental questions that allow the system to automatically qualify or disqualify applicants for reasons that are too complex to evaluate with a single question. For example, the system can be set up to evaluate combinations of work experience and education.
User interface and usability enhancements
Accessibility has been improved for all Action menus to support touchpad devices.
Improvements to your applicant portal
The help now provides more information to help applicants solve common problems.
Applicants can now change the order of their work experience entries.
Site performance
Search performance has been improved.

JOB POSTINGS

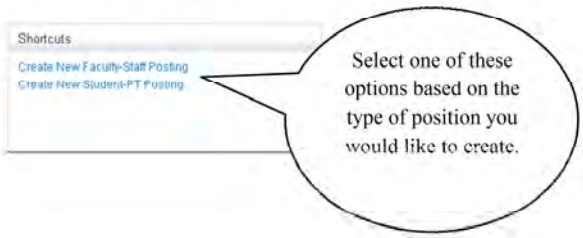
Overview

As a Hiring Manager, one of your responsibilities will be to create and maintain job postings. The following sections will explain the process of creating a job posting and how to manage it going forward.

Creating a Posting

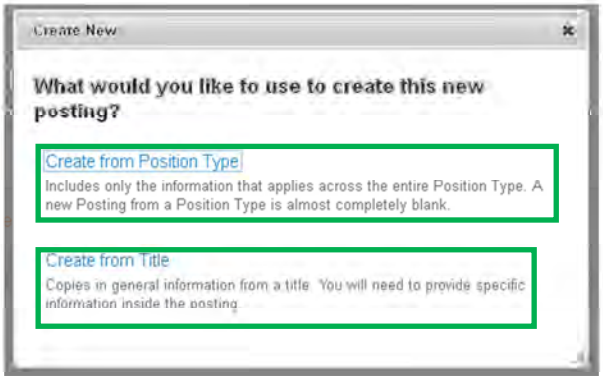
1. There are two ways to begin the process of creating a posting:

   a. The easiest way is to go the "Shortcuts" section of the homepage and click the link for the type of posting you wish to create.

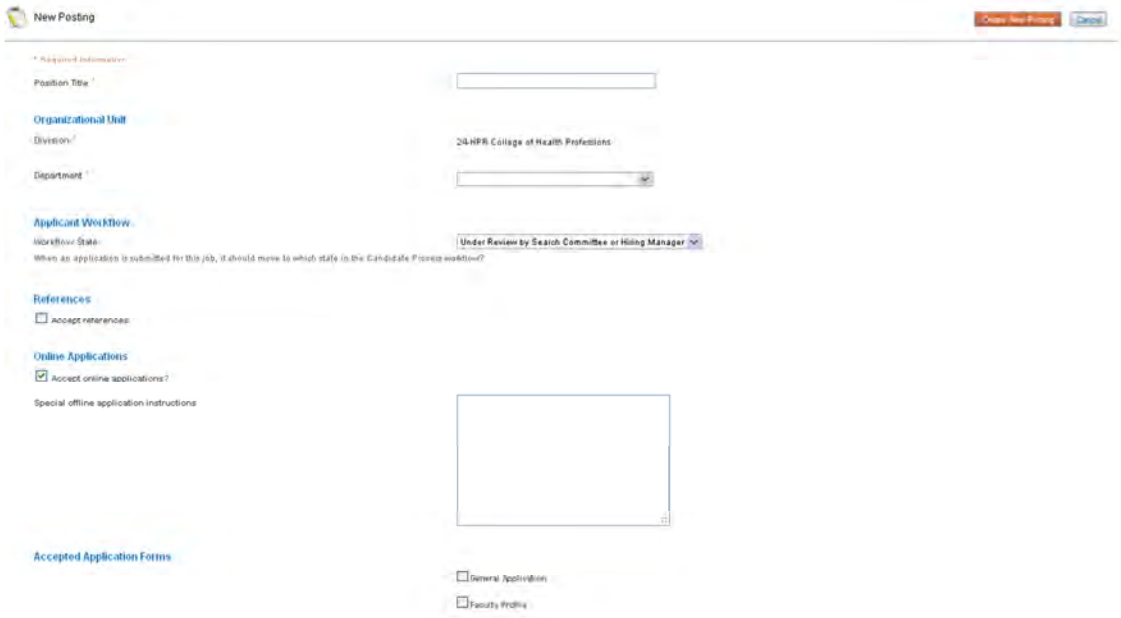

Shortcuts
Create New Faculty-Staff Posting
Create New Student-PT Posting
Select one of these options based on the type of position you would like to create.

   b. You can also go to the "Postings" tab and select the type of position you want to create. Then click on the "Create New Posting" button in the top right corner of the screen.

2. Once you have elected to create a posting, a dialog box will appear asking you to choose how you want to create the posting.


Create New
What would you like to use to create this new posting?
Create from Position Type
Includes only the information that applies across the entire Position Type. A new Posting from a Position Type is almost completely blank.
Create from Title
Copies in general information from a title. You will need to provide specific information inside the posting.

a. **Create from Position Type** - If you select to create the posting from this option, it will only fill in the information that is relevant to your department and Armstrong. Essentially, this is a blank template to be completed without any information automatically populated. You will have to input the majority of the information for your posting. If you click this option, you will be navigated to the settings page shown below and will be required to fill in the necessary information.
Once you have entered all of the information, click on the "Create New Posting" link. (This link will appear in the top right and bottom right corners of the screen.)

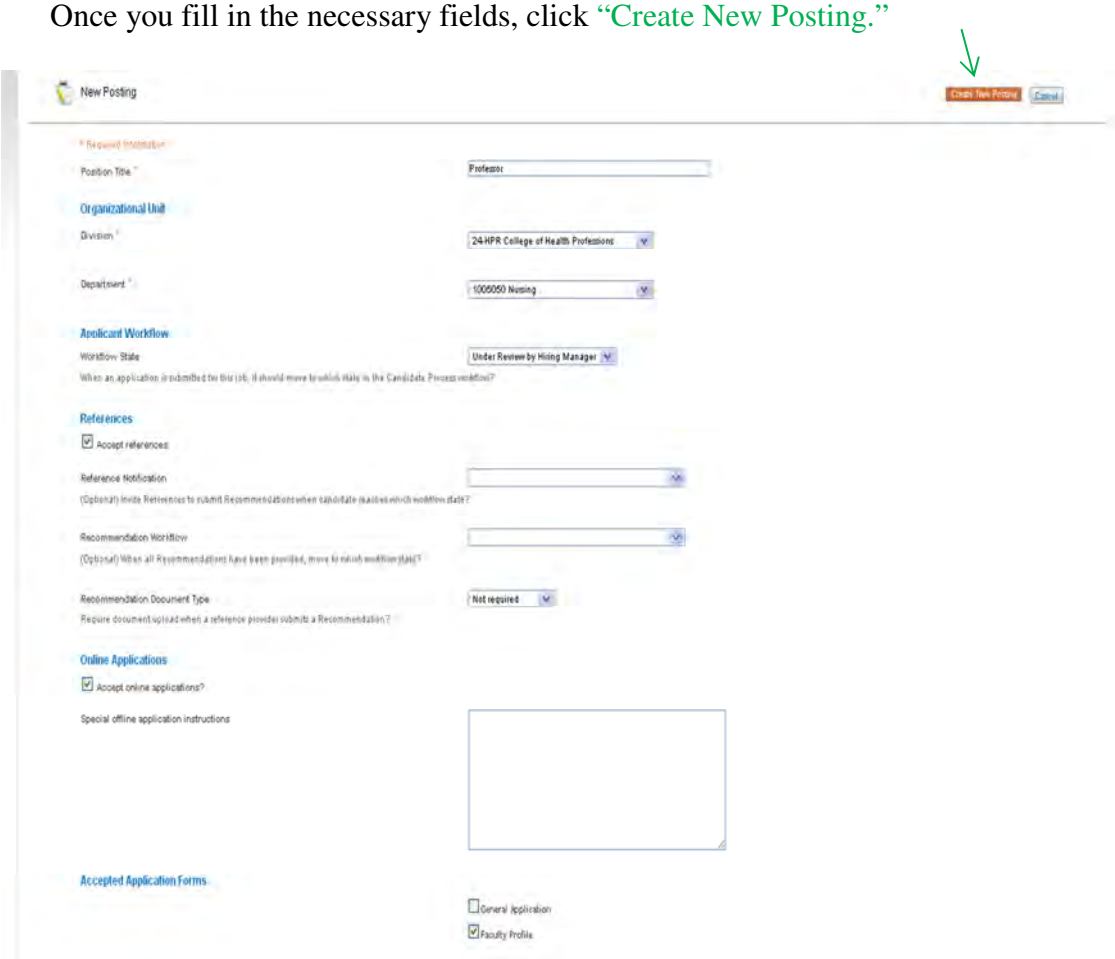


b. **Create from Title** - This option will use a template within the system based on the title of the position you want to create. Creating a posting from a title populates nature of work, essential duties, minimum qualifications, and preferred qualifications (if applicable). For example, if you want to create a posting for a Mail Clerk, you will search for Mail Clerk in the list of titles. If you would like to see what information is contained in that title before creating a posting from it, just hover over the "Actions" button, and select "View Title." After you have reviewed this information and you would like to continue on with the creation of that posting, simply hover over the "Actions" button once again and this time select "Create Form."

This action will begin the posting process with the information that is contained in that title and take you to the same screen that you are automatically directed to if you had created the posting using the "Create from Position Type" method. The only difference is that by creating the posting from a title, some of this information will be filled in for you.

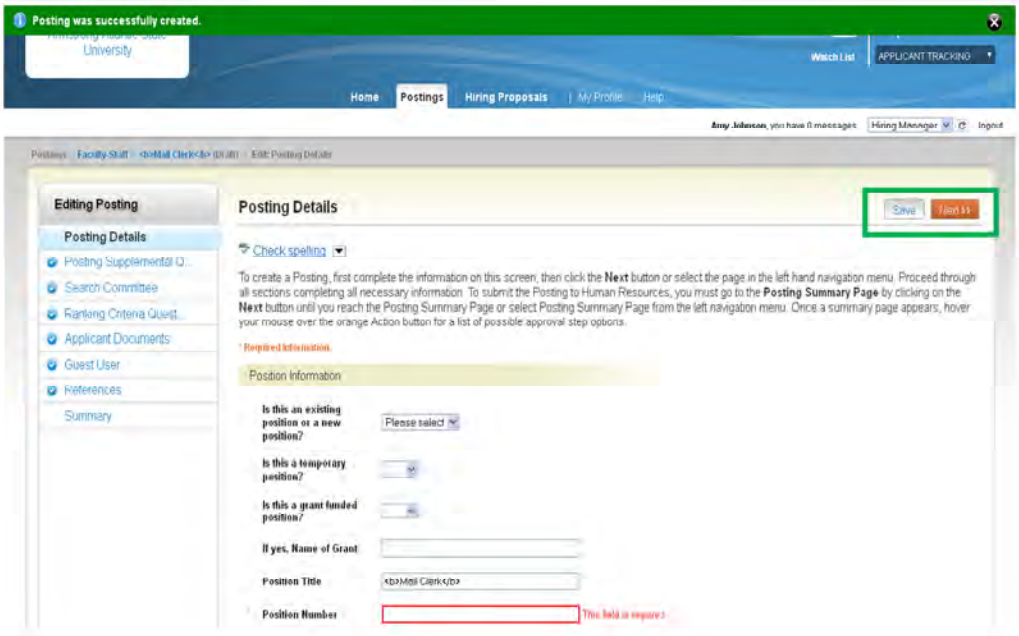
(**Note:** If you want to receive reference letters directly from the referee, you will select "Reference Letter" from the drop down menu for "Recommendation Document Type". Selecting this option will automatically send an email to each referee along with a link to upload his/her reference letter.)

Once you fill in the necessary fields, click "Create New Posting."



3. Once you have selected how you want to create the posting, you will then be directed to the posting form, where you will input the rest of the information about your posting. What information you will have to enter depends on which method you used to create the posting. If you used the "Create from Position Type" method, most of the fields will be empty and you will need to enter *all* of the necessary information. If you used the "Create from Title" method, some of the information will already be entered and you only have to add specifics as needed.

(**Note:** You should see a message at the top of the screen saying that your posting was successfully created.)

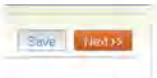


4. The menu on the left hand side of the screen shows you the pages that make up the Posting Form and allows you to navigate to another page if you want to skip or come back to it.

Helpful Tip: If you are creating a Student-PT position, all of the options shown above will appear except "Search Committee," "Ranking Criteria Questions," and "References." The steps detailed below should still be completed for Student-PT positions.

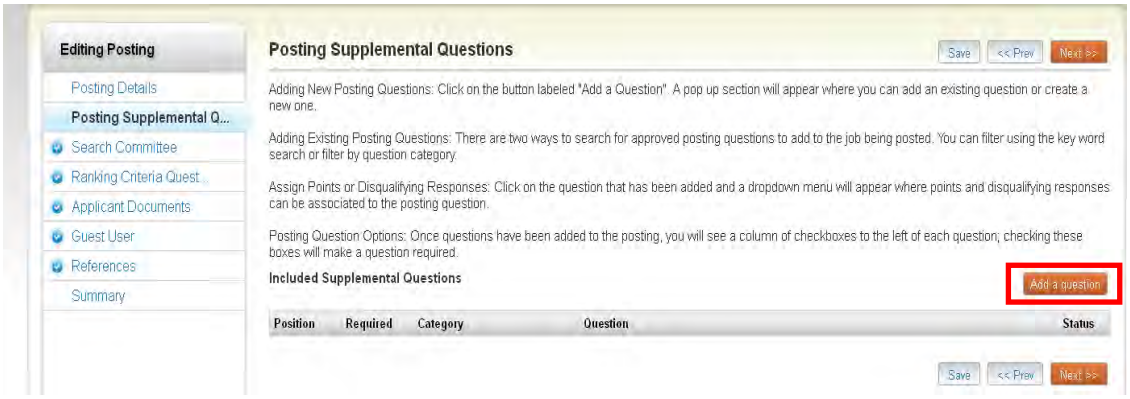
Helpful Tip: You will not be able to complete the field entitled "Budget Information." Only the Budget Director has access to this field. (For more information, see the "Approval Process" section on page 27.)

Once you have completed the "Posting Details" page, you have the option to click either "Save" or "Next."

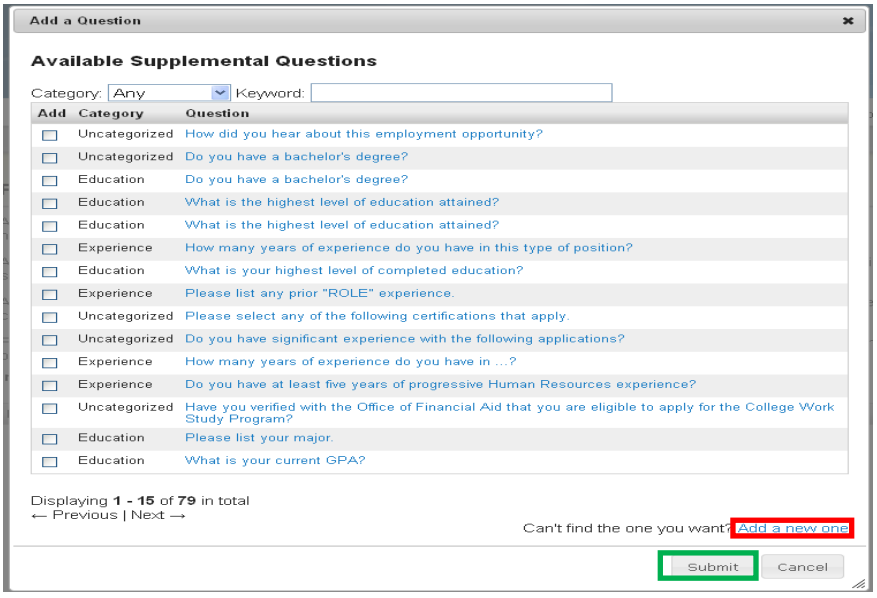


Clicking "Save" allows you to save this posting as a draft and access it later. Clicking "Next" allows you to save the work you have done thus far *and* move on to the next page of the Posting form.

5. After clicking "Next," you will be directed to the "Posting Supplemental Questions" page. This page allows you to attach questions to a posting that will "pre-screen" the applicants before they are added to the pool. This is an important part of the application process. Although these questions are not required, you are strongly encouraged to include them in your posting. To add a question, simply click on the "Add a Question" button.


Editing Posting
Posting Details
Posting Supplemental Q...
Search Committee
Ranking Criteria Quest...
Applicant Documents
Guest User
References
Summary
Posting Supplemental Questions
Save
<< Prev
Next >>
Adding New Posting Questions: Click on the button labeled "Add a Question". A pop up section will appear where you can add an existing question or create a new one.
Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category.
Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the posting question.
Posting Question Options: Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.
Included Supplemental Questions
Add a question
Position
Required
Category
Question
Status
Save
<< Prev
Next >>

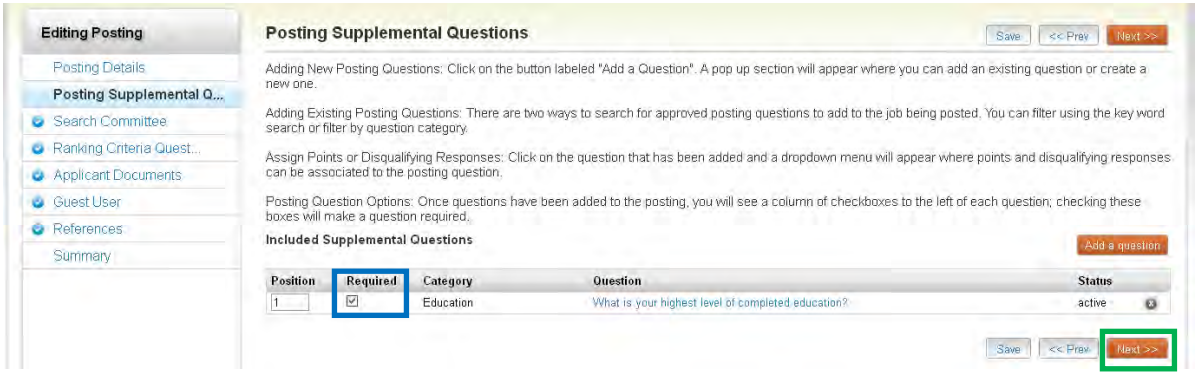
A dialog box will appear and you will be asked to choose a question from the question bank. You can also search for a question using the keyword feature. Click the radio button(s) next to the question(s) you would like to add to your posting.


Add a Question
Available Supplemental Questions
Category: Any
Keyword:
Add
Category
Question
Uncategorized How did you hear about this employment opportunity?
Uncategorized Do you have a bachelor's degree?
Education Do you have a bachelor's degree?
Education What is the highest level of education attained?
Education What is the highest level of education attained?
Experience How many years of experience do you have in this type of position?
Education What is your highest level of completed education?
Experience Please list any prior "ROLE" experience.
Uncategorized Please select any of the following certifications that apply.
Uncategorized Do you have significant experience with the following applications?
Experience How many years of experience do you have in ...?
Experience Do you have at least five years of progressive Human Resources experience?
Uncategorized Have you verified with the Office of Financial Aid that you are eligible to apply for the College Work Study Program?
Education Please list your major.
Education What is your current GPA?
Displaying 1 - 15 of 79 in total
← Previous | Next →
Can't find the one you want? Add a new one
Submit
Cancel

Helpful Tip: If you do not see the question that you want to include in the question bank, you have the option of creating your own question. Just click the "Add a new one" link and you will be able to create and format your own question.

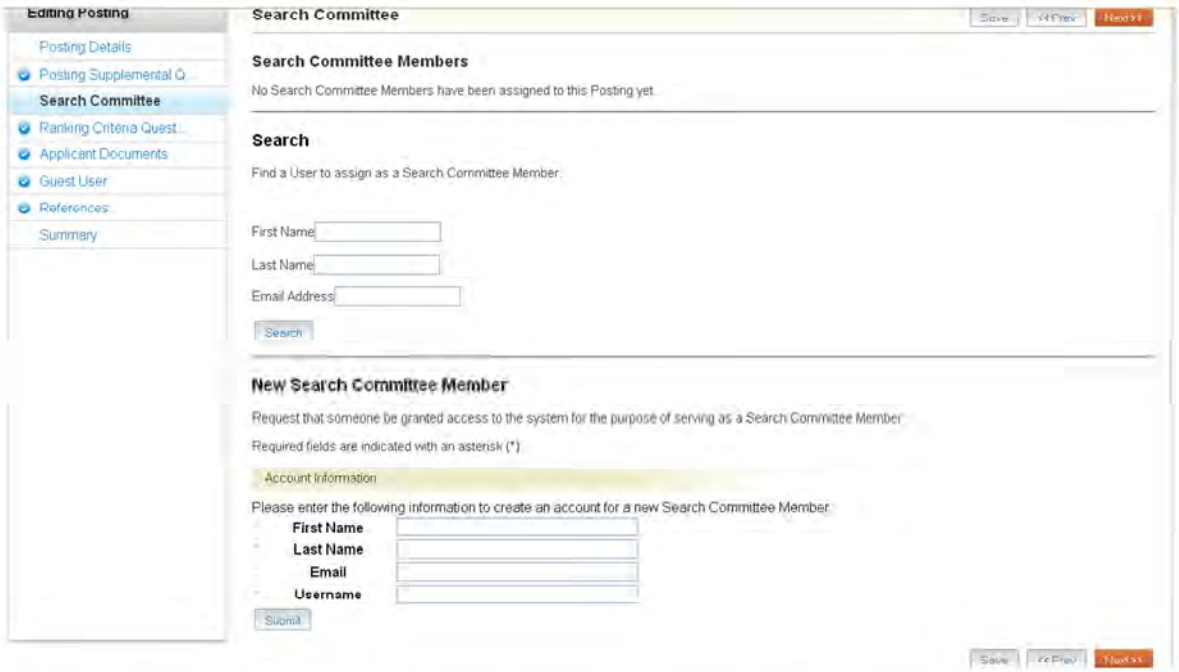
Once you have chosen the question(s) you want to include, click the "Submit" button.

The question(s) you have chosen will appear on the "Posting Supplemental Questions" page. Here you will also have to option to determine whether the applicant will be required to answer this question or not. If you would like for it to be a requirement, just check the box under the "Required" column. Otherwise, answering this question will be optional to the applicant and will not stop them from completing the application.


Editing Posting
Posting Details
Posting Supplemental Q...
Search Committee
Ranking Criteria Quest...
Applicant Documents
Guest User
References
Summary
Posting Supplemental Questions
Save
<< Prev
Next >>
Adding New Posting Questions: Click on the button labeled "Add a Question". A pop up section will appear where you can add an existing question or create a new one.
Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category.
Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the posting question.
Posting Question Options: Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.
Included Supplemental Questions
Add a question
Position
Required
Category
Question
Status
1
Education
What is your highest level of completed education?
active
Save
<< Prev
Next >>

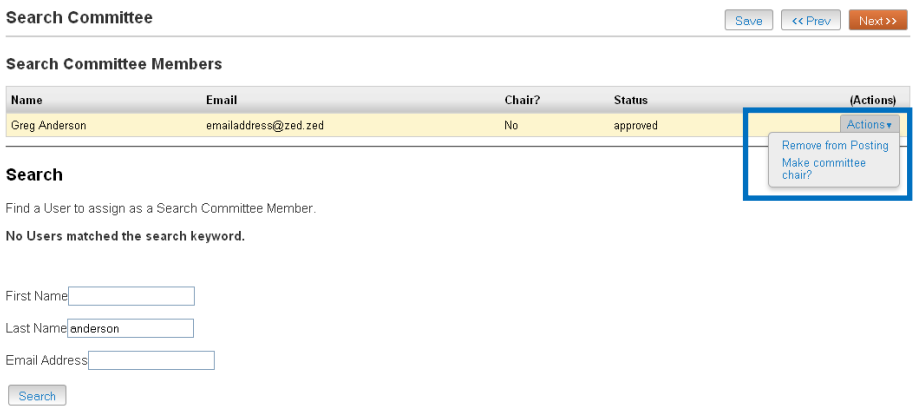
When you are satisfied with your supplemental question selection, click "Next" to move on to the next page in the posting.

6. The next page gives you the option to add individuals to the Search Committee for your posting. The Search Committee is responsible for the assessment of the applicants for this position. Their duties include, but are not limited to, interviewing and evaluating applicants. All Search Committees have a Search Chair who leads the team and manages the entire search process. When a Search Chair is added to the posting, he/she will be able to manage the applicant pool, meaning that he/she can move applicants to a different workflow state based on where they are in the hiring process. Search Committee members can view the applicants in the pool but cannot take any action on them.



To add someone to the Search Committee, you can search for him/her in the system using first name, last name, and/or email address. (Note: This tool will only be able to locate people who are already registered in the PeopleAdmin system.) Type the information into the corresponding cells and then click "Search." Once the system has found him/her, the name and email address will appear within the search section. If this individual is the Search Chair, make sure to check the "Make Member the Committee Chair" box. If he/she is a member at large, simply click the "Add Member" button. Repeat this step to add multiple members to the search committee.

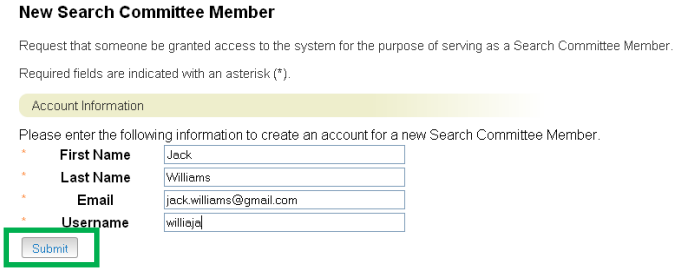
When the members and chair has been added, their names and information will appear under the "Search Committee Members" section of the page.



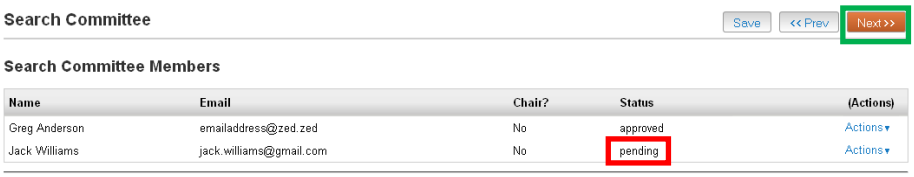
Helpful Tip: You have the option to remove a member or change an individual's title to Search Chair. To do this just hover over the "Actions" link and select the action you want to take.

You can also add members to the Search Committee who are not in the PeopleAdmin system. To do this, fill out the "New Search Committee Member" section at the bottom of the screen and click "Submit."

REMEMBER: The username will always follow this format: first six letters of last name, first two letters of first name, all lowercase, all together as one word. For example, if your name is Amy Johnson, your username will be "johnsoam." The username must always have eight characters so if your last name does not have six or more letters, then extra letters will be taken from your first name to meet the character requirement. For example, an individual named John Smith's username would be "smithjoh."


New Search Committee Member
Request that someone be granted access to the system for the purpose of serving as a Search Committee Member.
Required fields are indicated with an asterisk (*).
Account Information
Please enter the following information to create an account for a new Search Committee Member.
First Name
Jack
Last Name
Williams
Email
jack.williams@gmail.com
Username
williajo
Submit

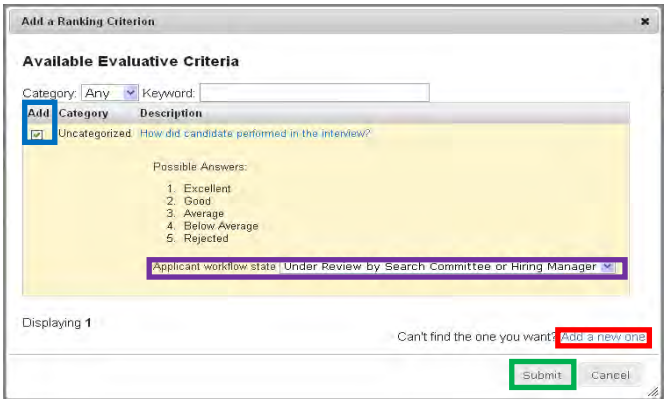
Once you have submitted the new member, their name will appear in the "Search Committee Members" section as well, but you will notice that their Status is Pending. This is because Human Resources must approve this member before they will be allowed to view the posting. An automatic message will be sent to Human Resources and, after they approve the member, that individual will be able to access the posting.



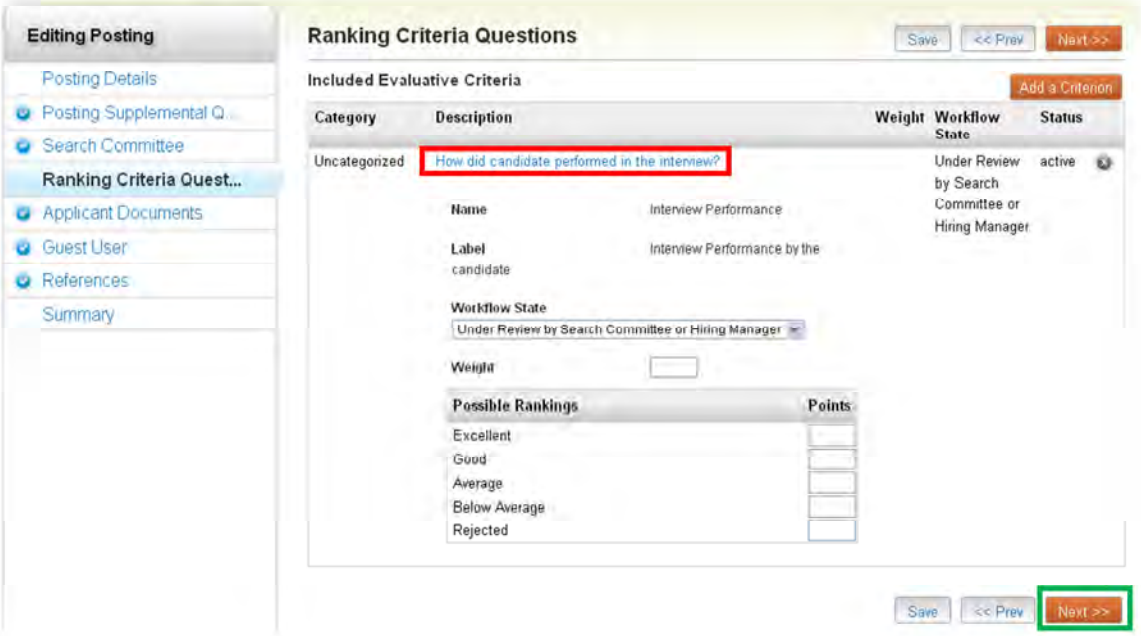
When all of the desired members have been added, click "Next" to move on with your posting.

7. The "Ranking Criteria Questions" page allows you to include evaluative information about the applicants so that you can put them in a meaningful order. For example, you can make "performance in interview" a criterion and thus rank your applicant pool by rating how well each applicant did in the interview. To add criteria, click on the "Add a Criterion" button.

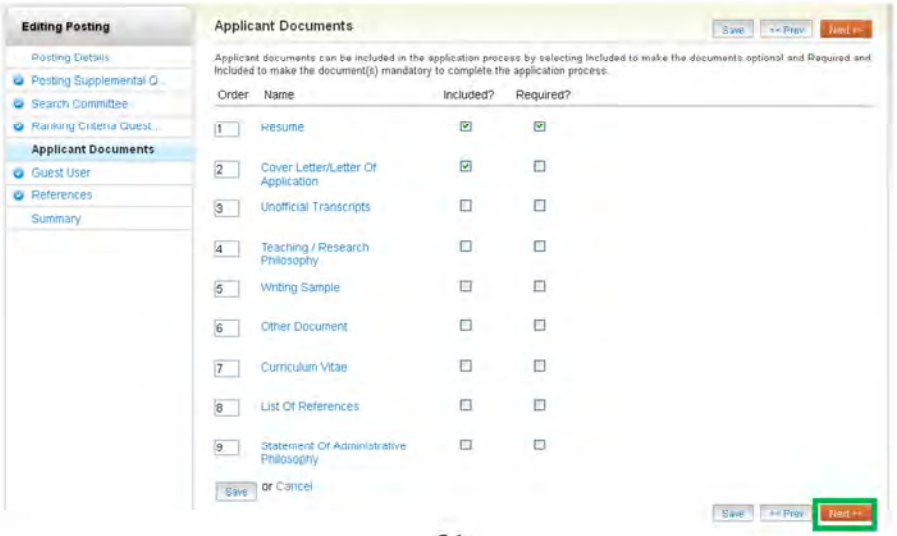
A dialog box will appear that will allow you to choose the evaluative criteria that you want to apply to the posting. To select criteria, check the box under the "Add" column, next to the question that you desire to use. Just like with the supplemental questions, if there is an evaluative criteria you would like to use that does not appear in the list, you can make your own by clicking "Add a New One." You also have the option to set the workflow state of the criteria. To do this, simply select the desired state from the "Applicant Workflow State" drop down menu. When your selections have been finalized, click "Submit."



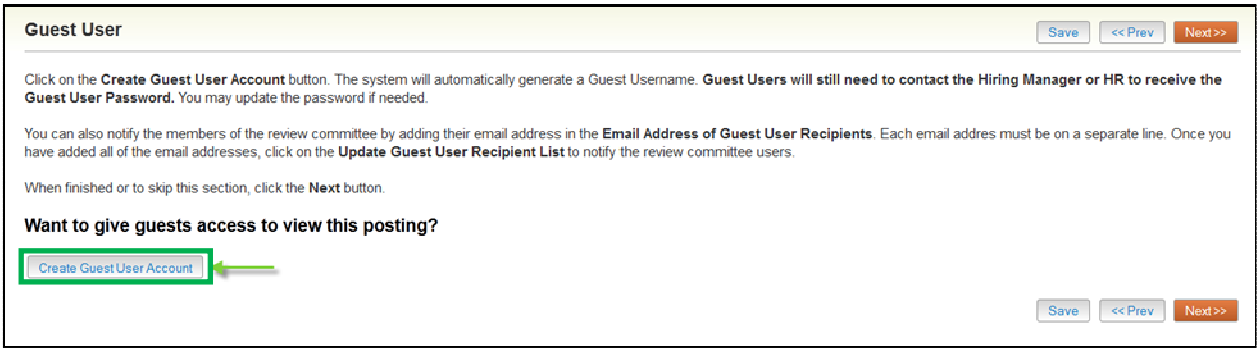
After clicking "Submit," the questions that you selected will appear on the "Ranking Criteria Questions" screen. By clicking on the question, you will have the option to assign points to each option, determine the weight of the question, and change the workflow state. When all desired settings are in place, click "Next" to move on to the next step in the posting.



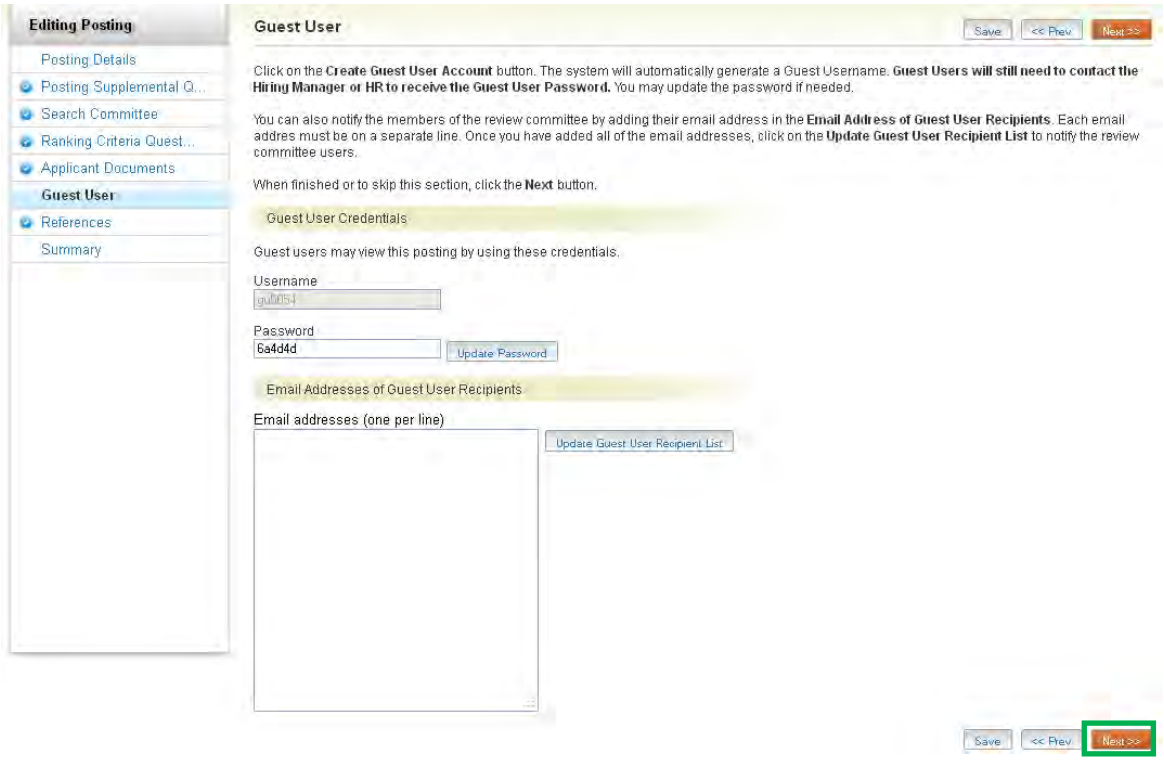
8. The "Applicant Documents" page allows the user to define the documents that applicants may supply during the Application Process. Documents may be defined as either "Included" and/or "Required." "Included" simply prompts applicants to upload the document if they wish to do so. Marking "Required" means that an applicant must supply the document in order to continue with the application process. (Note: A document must be marked "Included" and "Required" in order for it to be required during the application process.) When you are satisfied with your selections, click "Next" to move on.



9. The "Guest User" page allows you to set up a "view-only" account for individuals that are not Armstrong employees and need access to the posting and applicant information. The guest user is assigned to one posting and will be automatically de-activated once the posting has completed a workflow cycle. If you click on the "Create Guest User Account" button, the system will automatically generate a guest username. You may update the password if needed.

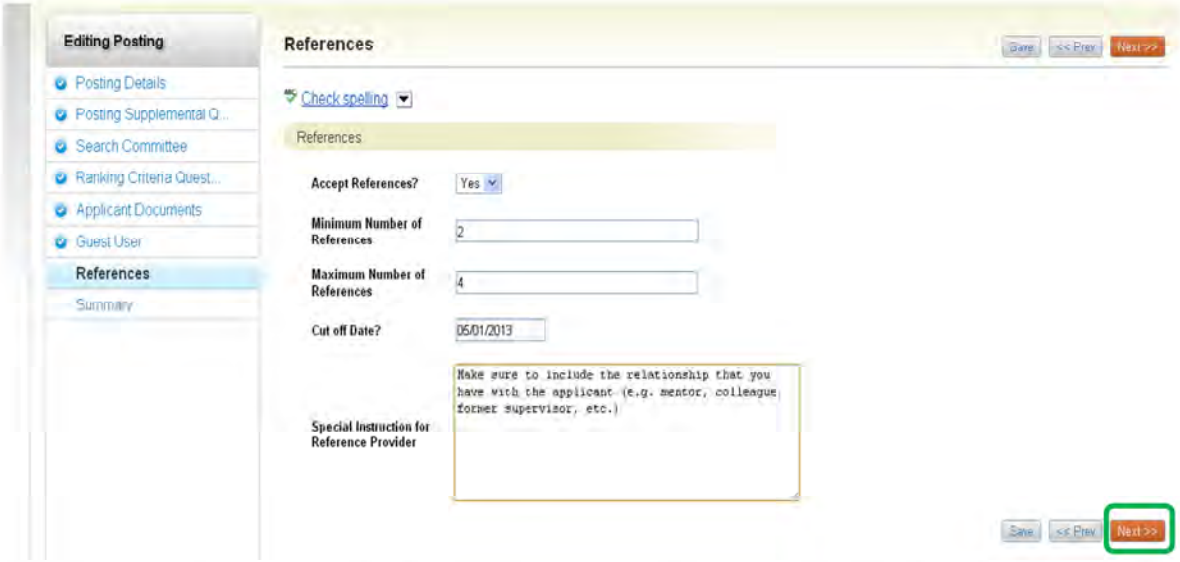

Guest User
Save
<< Prev
Next >>
Click on the Create Guest User Account button. The system will automatically generate a Guest Username. Guest Users will still need to contact the Hiring Manager or HR to receive the Guest User Password. You may update the password if needed.
You can also notify the members of the review committee by adding their email address in the Email Address of Guest User Recipients. Each email addres must be on a separate line. Once you have added all of the email addresses, click on the Update Guest User Recipient List to notify the review committee users.
When finished or to skip this section, click the Next button.
Want to give guests access to view this posting?
Create Guest User Account
Save
<< Prev
Next >>

You can also notify guest users of the username and password by adding their email address in the "Email Address of Guest User Recipients" field. Each email address must be on a separate line. Once you have added all of the email addresses, click on the "Update Guest User Recipient List" button. Each guest user will receive an email with login instructions and access information. When you have finished filling out this information, click "Next."


Editing Posting
Posting Details
Posting Supplemental Q...
Search Committee
Ranking Criteria Quest...
Applicant Documents
Guest User
References
Summary
Guest User
Save
<< Prev
Next >>
Click on the Create Guest User Account button. The system will automatically generate a Guest Username. Guest Users will still need to contact the Hiring Manager or HR to receive the Guest User Password. You may update the password if needed.
You can also notify the members of the review committee by adding their email address in the Email Address of Guest User Recipients. Each email addres must be on a separate line. Once you have added all of the email addresses, click on the Update Guest User Recipient List to notify the review committee users.
When finished or to skip this section, click the Next button.
Guest User Credentials
Guest users may view this posting by using these credentials.
Username
Password
6a4d4d
Update Password
Email Addresses of Guest User Recipients
Email addresses (one per line)
Update Guest User Recipient List
Save
<< Prev
Next >>

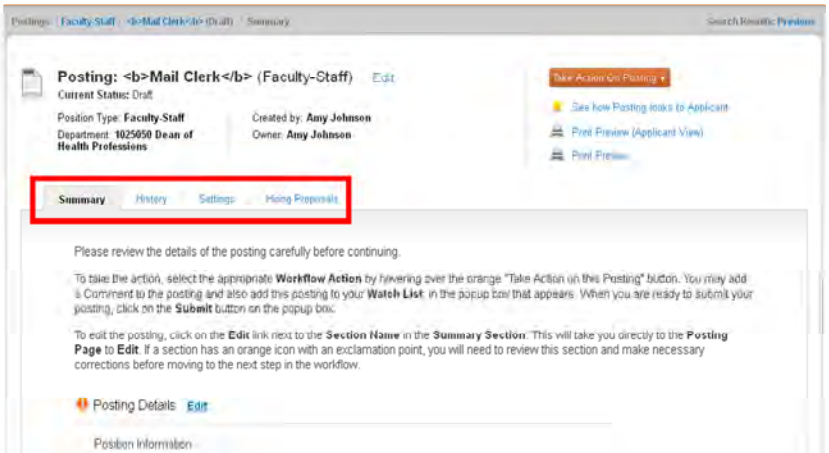
10. The "References" page allows you to set the rules and requirements for applicants providing references in their applications. You will notice that there is a dialog box asking if you would like to "Accept References?" If the answer is no, make sure that you select "No" from the drop down menu and click "Next" to continue. However, if you want references provided in the application, select "Yes" from the drop down menu and fill in the necessary information in the cells to determine the minimum and maximum reference required. Once this is complete, click "Next" to continue.

    (**Note:** If you elected to receive reference letters directly from the referees when you created the position, the box designed "Special Instructions for Reference Provider" allows you to send them a note along with the reference solicitation.)



11. Once you have completed entering in all of the information for the posting, you will be directed to the "Summary" page. This page allows you to review the posting and make any necessary edits before you send it on to the next approver. Please review the details of the posting carefully before continuing.

> **Helpful Tip:** If a section has an orange icon with an exclamation point (e.g. Posting Details Edit), you will need to review this section and make necessary corrections before moving to the next step in the workflow.

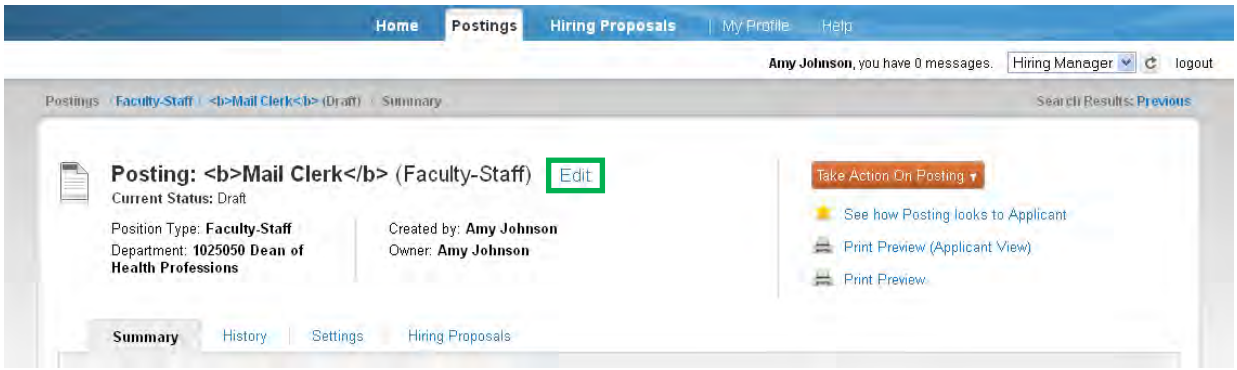


The "Summary" page also has Tabs to help you navigate throughout the posting. When you land on this page, you are automatically viewing the "Summary" tab. The "History" tab shows you the status and all of the previous actions taken on the posting you are viewing. The "Settings" tab allows you to change the settings you put in place at the start of creating the posting. The "Hiring Proposals" tab allows you to view the hiring proposals that have been created for the applicants for this posting.

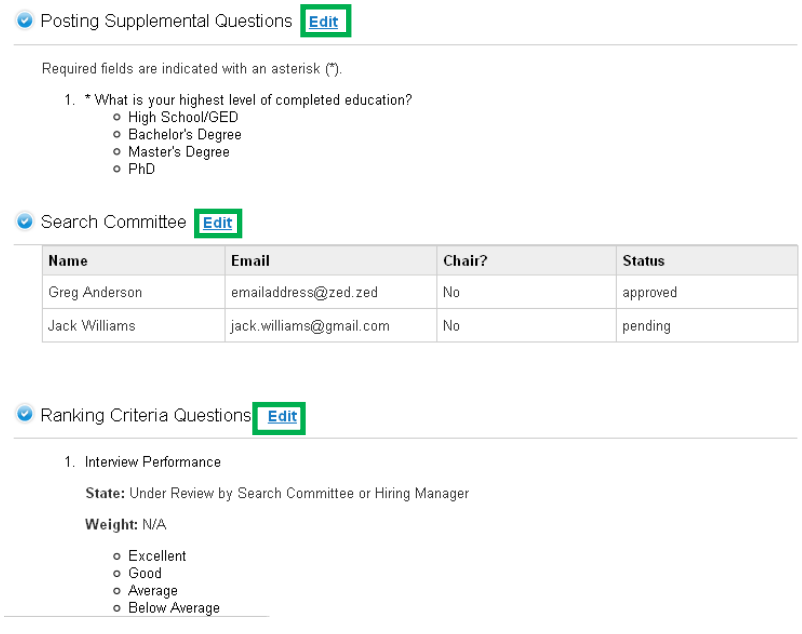
Helpful Tip: See also page 59 at the end of this document for the Process Flow Chart 1: Creating a Posting.

Modifying/Editing a Posting

Only Hiring Managers can edit postings, and this can only be done while they are the workflow state owners. If you have this access and you notice changes that need to be made as you are reviewing the summary of your posting, click the "Edit" link at the top of the page next to the title of the position. This page will allow you to start from the first section of the posting and edit the desired information.

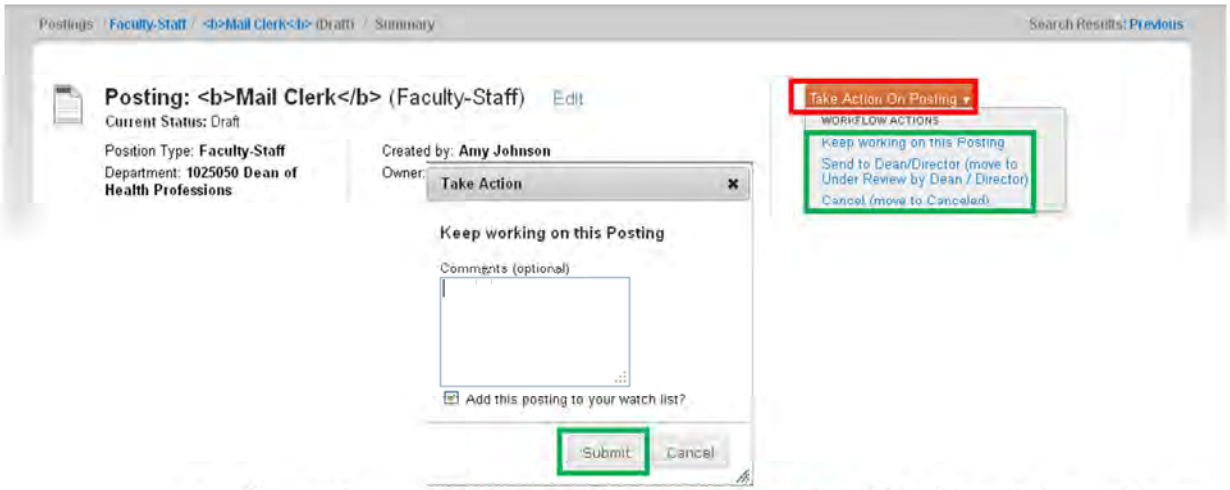


However, if you only want to make changes in a specific part of the posting, you have the option to skip right to that section for editing. On the "Posting Summary" page, click on the "Edit" link next to the name of the section that you wish to modify. This will take you directly to that particular posting page to edit.



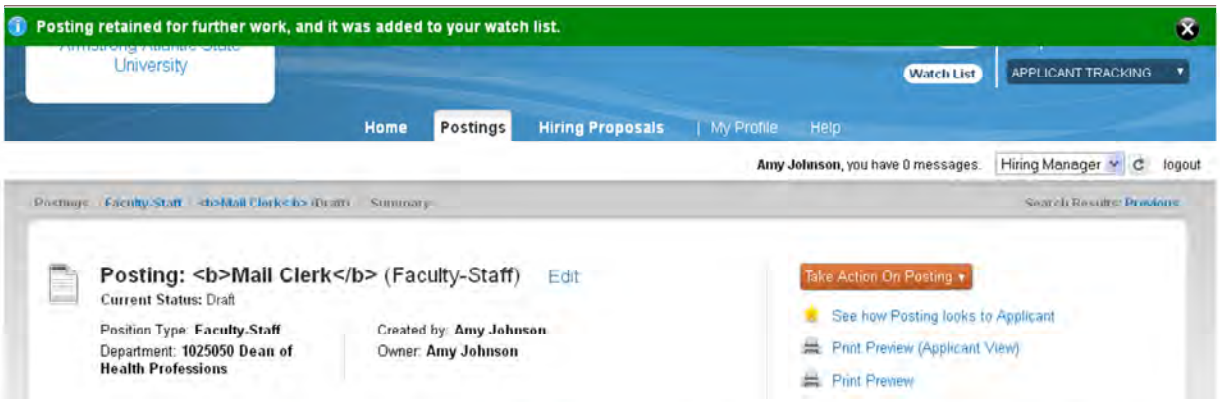
Available Actions

. If you hover over the "Take Action On Posting" button, you will see three options: "Keep working on this Posting," "Send to Dean/Director," and "Cancel."



a. If you choose to "Keep working on this Posting," it will save the posting as a draft, and you can return at a later time to finish working on the posting. The dialog box shown below will appear, and you will have to opportunity to type comments and add this posting to your watch list.

When you have input this information, click "Submit" and a success message should appear saying that your posting has been retained for further work and added to your watch list.



b. "Send to Dean/Director" will move the posting to the next individual in the workflow, which is most often the Dean or Director of your department. You should only take this action when your posting is complete and you are ready for it to move to the next stage. After this point, you can no longer make changes. Another dialog box will appear for you to leave comments for the

Dean/Director and/or add or remove the posting from your watch list. When you are finished, click "Submit."Another success message should appear at the top of the screen confirming that your posting was sent.

c. If you "Cancel" a posting, it will be moved to a non-active state. This means that you no longer want to fill or advertise this position. This option does not remove the posting from the system; the posting will still be listed, but it will show that it is in cancelled state. Once again, a dialog box will appear where you can add comments or add/remove the posting from your watch list. Clicking "Submit" will move the posting to cancelled.

Helpful Tip: If you want to see how your posting will look to the applicant, you have the option to view and/or print the posting in this format. You can also print the posting exactly as it is shown on the summary page. These options are shown below.

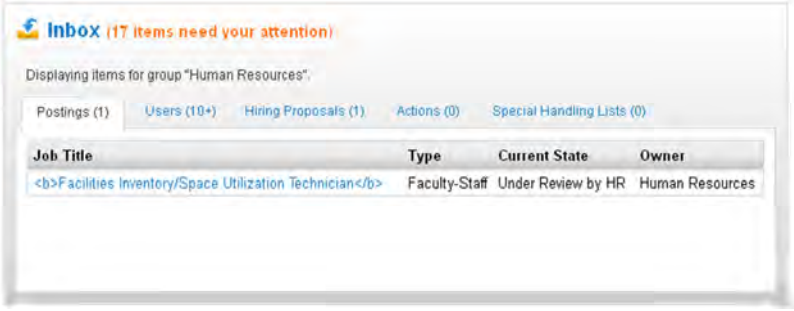
APPROVAL PROCESS

All postings must go through a detailed approval process before the positions can be advertised to potential applicants. This workflow is shown below:
All approvers are required to review the posting summary, details, history, and any other

comments or notes associated with the posting. However, they are unable to modify the posting. If changes to the posting need to be made, approvers only have the option to send the posting back to the individual who sent it to them. Therefore, a posting will have to go backwards through the chain of command until it reaches the Hiring Manager again before changes can be made. For example, if the Vice President of the Division notices something that he or she thinks should be revised, he/she will have to send the posting back to the Budget Director, who will have to send it back to the Dean/Director, who will then send it back to the Hiring Manager to make the necessary changes.

The Budget Director is the only approver who actually must take action to move the posting to the next stage. He or she must fill out the "Budget Information" section (Remember: This is the section that the Hiring Manager could not access when creating the posting. See page 16 for further details.) Although they can input the budget information, the Budget Director cannot make changes to any other section, just like the other approvers.

After each individual moves the posting to the next approver in the workflow, that person will be notified (via email) that he/she needs to take action on the posting. When the next approver logs in to the PeopleAdmin system, he/she will notice that there is a posting waiting in his/her Inbox.



The Approver just has to click on the Job Title and he/she will be taken to the Summary Page, where they can review the posting and then move it on in the workflow. The final approver, in this case Human Resources, can move it to "Approved for Later Posting," "Approved for Internal," or "Posted," in addition to being able to move it back to the Manager who created the posting.

(Note: "Approved for Later Posting" means that the posting will be advertised based upon the date approved by the President's Cabinet.)

> ☆ **Helpful Tip:** See also page 60 at the end of this document for the Process Flow Chart 2: Approval Process.

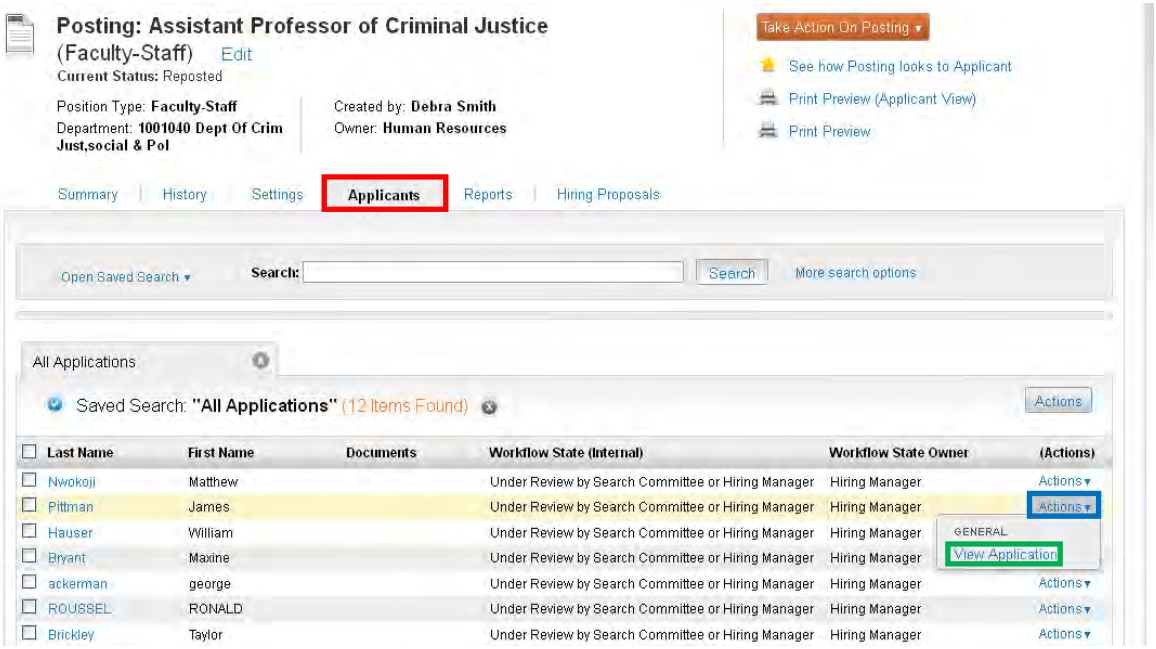
MANAGING A POSITION

Overview

Once the position you created has been finalized and posted, it is important to monitor the posting in the hiring process. This becomes especially important once people start applying for the position and you are required to manage their workflow states. The following sections will explain the steps involved in managing applicants, including managing their application and other documents and moving them forward in the hiring process.

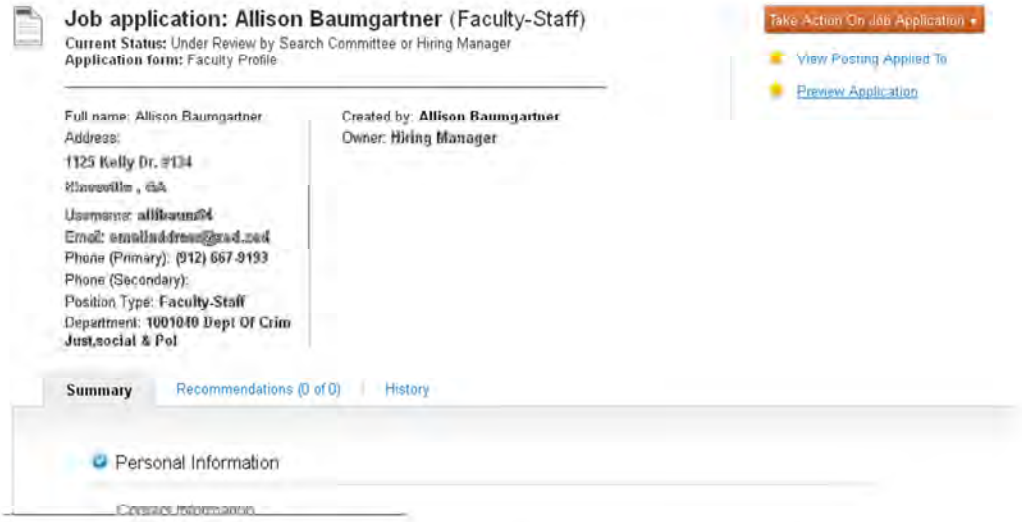
Accessing Application and Documents

Within the PeopleAdmin system, you have the ability to monitor and manage the people who have applied for your posting. Under the "Applicants" tab, you will see a list of all of the individuals who have applied for that particular posting and you will be able to view and manage their applications. From here, you will be able to see a summary of information about the applicants, such as their names, the number of attached documents, and the workflow states of their applications.


Posting: Assistant Professor of Criminal Justice
(Faculty-Staff) Edit
Current Status: Reposted
Position Type: Faculty-Staff
Department: 1001040 Dept Of Crim Just,social & Pol
Created by: Debra Smith
Owner: Human Resources
Take Action On Posting
See how Posting looks to Applicant
Print Preview (Applicant View)
Print Preview
Summary
History
Settings
Applicants
Reports
Hiring Proposals
Open Saved Search
Search:
Search
More search options
All Applications
Saved Search: "All Applications" (12 Items Found)
Actions
Last Name
First Name
Documents
Workflow State (Internal)
Workflow State Owner
(Actions)
Nwokoji Matthew Under Review by Search Committee or Hiring Manager Hiring Manager Actions
Pittman James Under Review by Search Committee or Hiring Manager Hiring Manager Actions
Hauser William Under Review by Search Committee or Hiring Manager Hiring Manager
Bryant Maxine Under Review by Search Committee or Hiring Manager Hiring Manager
ackerman george Under Review by Search Committee or Hiring Manager Hiring Manager Actions
ROUSSEL RONALD Under Review by Search Committee or Hiring Manager Hiring Manager Actions
Brickley Taylor Under Review by Search Committee or Hiring Manager Hiring Manager Actions
GENERAL
View Application

Before determining whether an individual will move forward in the hiring process, you must review his/her application and attached documents. To access an individual's documents, simply hover over the "Actions" button and click "View Application."

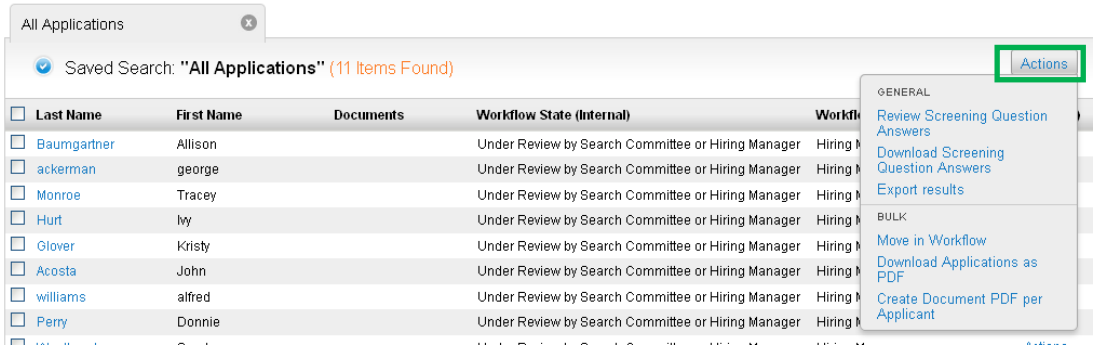
You will be navigated to the application summary page. You can scroll through this page to view the applicant's personal information, references, required documents, etc.



Once you reach the "Required Documents" section, you can either select the specific document you want to view or you can download a PDF that includes the application and all supporting documents.

Tracking/Managing Applicant Pool

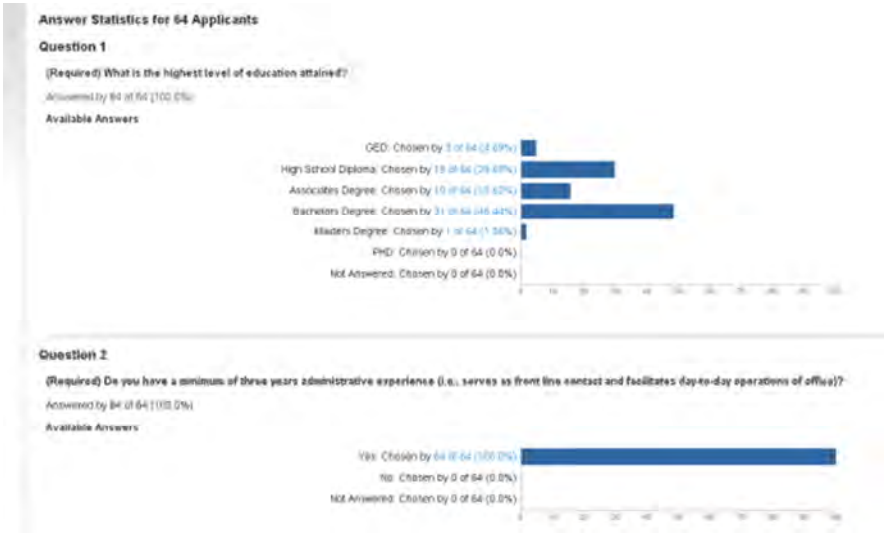
There are a number of actions that you can take on either individual applicants or a group of applicants. **Note: In order to take these actions, you must be viewing the applicant pool as the Hiring Manager or a member of the Search Committee group.** To view a list of the general actions that can be taken, hover over the "Actions" button that appears *above* the applicant list. The options in this list are general and bulk actions. These allow the user to move multiple applicants at once to the same workflow state, so that you do not have to repeatedly perform the same action on applicants individually.

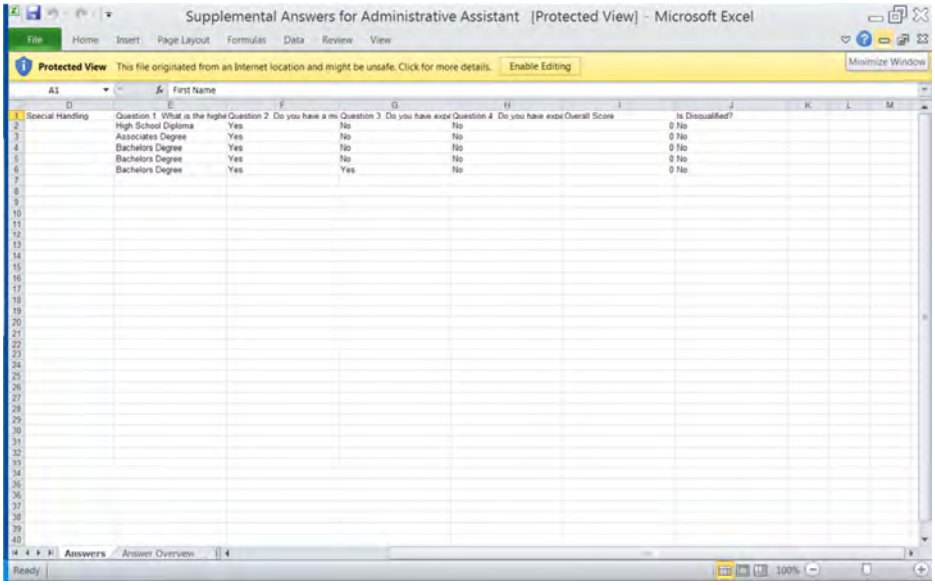

All Applications
Saved Search: "All Applications" (11 Items Found)
Actions
GENERAL
Review Screening Question Answers
Download Screening Question Answers
Export results
BULK
Move in Workflow
Download Applications as PDF
Create Document PDF per Applicant
Last Name
First Name
Documents
Workflow State (Internal)
Baumgartner Allison Under Review by Search Committee or Hiring Manager
ackerman george Under Review by Search Committee or Hiring Manager
Monroe Tracey Under Review by Search Committee or Hiring Manager
Hurt Ivy Under Review by Search Committee or Hiring Manager
Glover Kristy Under Review by Search Committee or Hiring Manager
Acosta John Under Review by Search Committee or Hiring Manager
williams alfred Under Review by Search Committee or Hiring Manager
Perry Donnie Under Review by Search Committee or Hiring Manager

"Review Screening Question Answers" allows you to look at each individual's answer to the supplemental question(s), if applicable. This action will take you to a new screen where you will see a list of all applicants and their answer(s). "Download Screening Question Answers" allows you to download these questions and answers as a PDF document, which can be saved for later retrieval. You can create and view PDFs for all of your applicants, or select individual applicants. Simply select the applicant(s) of interest by checking the boxes next to their names and click the action you want to take.

Both of the "export" actions (i.e. "Export Applicants without Email" and "Export Results") will take the information contained in the application and/or other documents and open or save them in a different program. The default program for exporting information is Excel, but you can choose the program that works best for you.

- To review several applicants' answers to supplemental questions together: Select the applicants of interest. From the main Actions menu, select **Download Supplemental Question Answers**. This presents the statistical breakdown of how the applicants answered each question (see image below).


Answer Statistics for 64 Applicants
Question 1
(Required) What is the highest level of education attained?
Available Answers
GED: Chosen by
High School Diploma: Chosen by
Associates Degree: Chosen by
Bachelors Degree: Chosen by
Masters Degree: Chosen by
PHD: Chosen by 0 of 64 (0.0%)
Not Answered: Chosen by 0 of 64 (0.0%)
Question 2
(Required) Do you have a minimum of three years administrative experience (i.e., serves as front line contact and facilitates day-to-day operations of office)?
Available Answers
Yes: Chosen by
No: Chosen by 0 of 64 (0.0%)
Not Answered: Chosen by 0 of 64 (0.0%)



  - To see which applicants gave a particular answer to a question, follow the link associated with the answer. The question detail page presents the list of applicants who gave this answer.

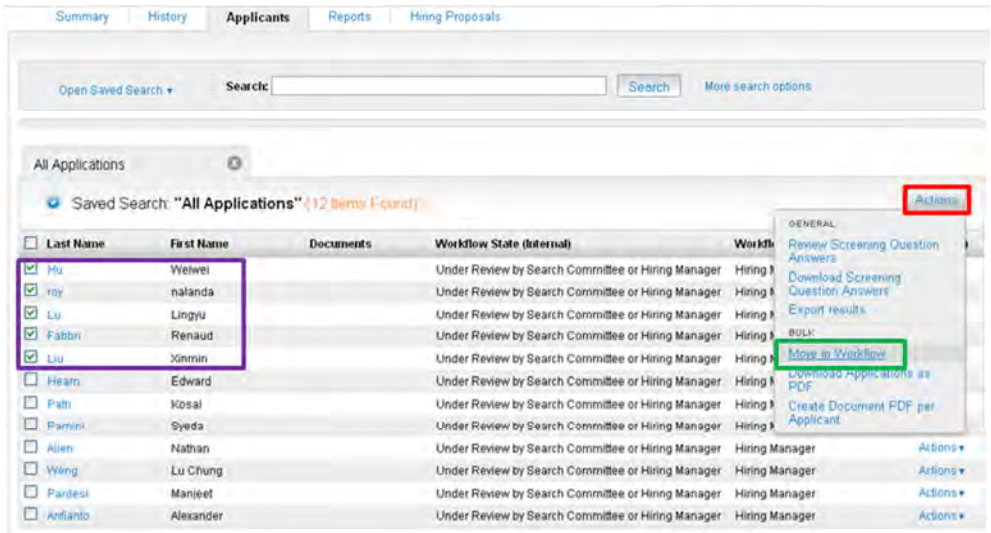
Helpful Tip: If the Hiring Manager or Search Chair overlooked *even one person* in the applicant pool the bulk function for moving applicants through the workflow **will not work.** This is why it is important to move individuals through each step in the process. If you take all of the necessary steps throughout this process, you will have less to do when the hiring process is over.

Moving Applicants Forward

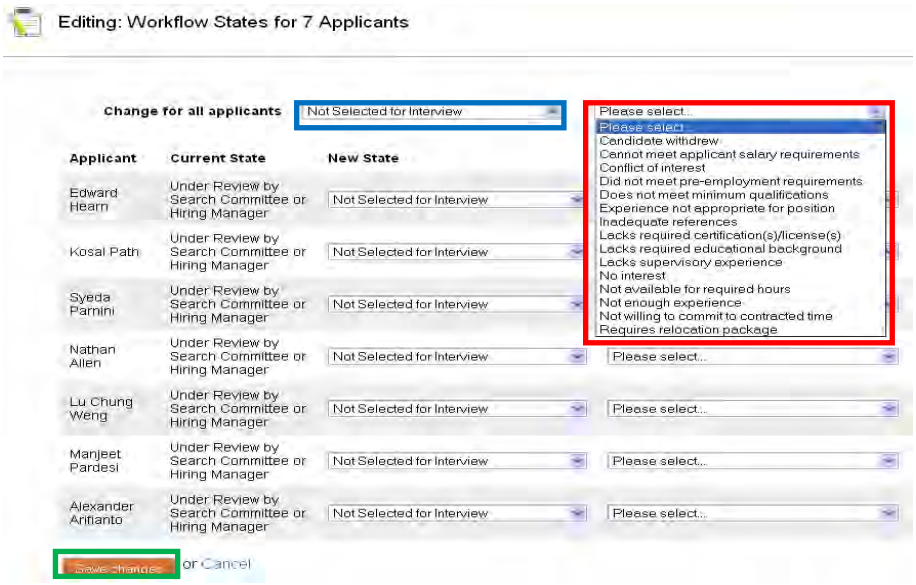
Professionals/Administrators, and Faculty –The same hiring process applies to all professional/administrative and faculty positions. The first step of the process is to specify a "Review of Application Date" in the "Special Instructions" section of the posting. The purpose of this field is to inform the applicants when the review of applications will begin so that they can submit their applications by this date .The posting will need to be advertised at least three weeks prior to the "Review of Application Date," to give applicants sufficient time to submit their materials.

As you are reviewing the applications, you will complete a Screening Grid. This grid will include all of the applicants whose applications were submitted by the review date.. Once you complete the grid, you will be able to compare the skills and abilities of each applicant to the minimum qualifications of the position. Then you will narrow the applicant pool until you reach a semi-finalist group, usually consisting of about 5-10 applicants.

Note: All applicants need to be moved through the PeopleAdmin workflow based on each decision made. In the applicants tab of the posting, select all of the individuals that you would like to move forward in the process by checking the boxes next to their names. Hover over the "Actions" button and then select "Move in Workflow."



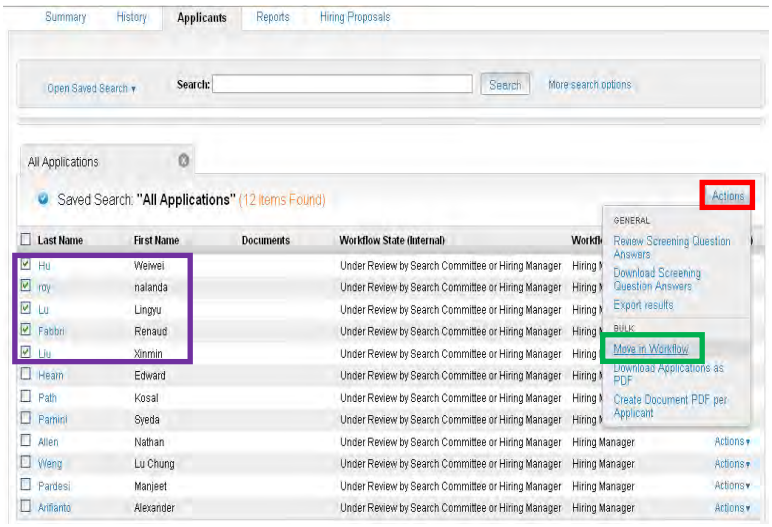
All applicants who do not make the cut to the next round should be moved to "Not Selected for Interview," which can be found in the drop down menu, You will be asked to select a reason from the choices that will appear. If the reasons are different for each candidate, you will need to perform this step individually. When finished, select "Save Changes."A success message should appear at the top of the screen stating that the transition process has started and may take a few minutes.



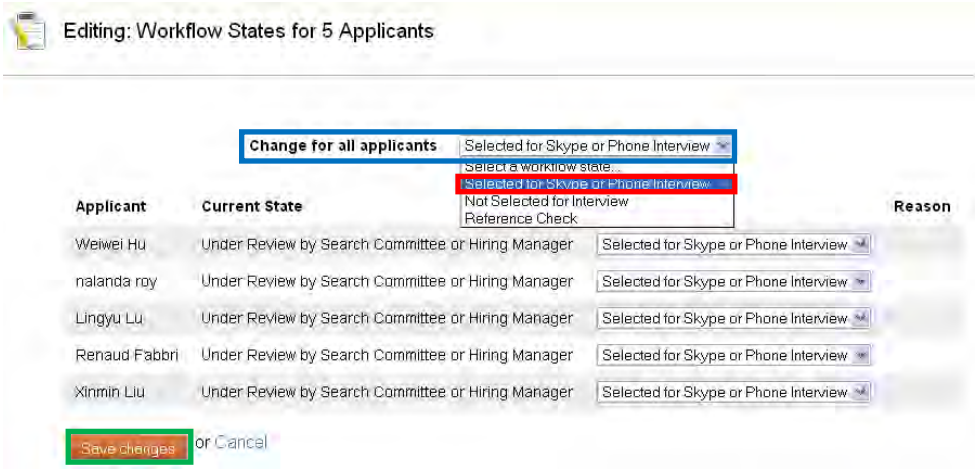
Following this step, you will then work towards narrowing the pool down to about 3-5 people for the finalist group. There are two options for narrowing the pool at this stage:

1. **Conduct Skype Interviews** - With this option, you will create a finalist group by conducting Skype interviews with all of the individuals in your semi-finalist group. At this point you should prepare your questions. Make sure that all applicants are asked the same questions during the interviews.

Note: All individuals will need to be moved through the PeopleAdmin workflow at each step in this process. The 5-10 candidates who were selected to be narrowed down should be moved to "Selected for Skype Interview." In the applicants tab of the posting, select all of the individuals that you would like to move on in the process by checking the boxes next to their names. Hover over the "Actions" button and then select "Move in Workflow."



You will then be directed to the page where you can edit the workflow states of all the applicants selected. For those individuals who were selected to move forward, select the "Change for all applicants" drop down menu at the top of the page and choose "Selected for Skype or Phone Interview." This will change the state of all the applicants on the page. Click "Save Changes" to complete this action. A success message should appear at the top of the screen stating that the transition process has started and may take a few minutes.

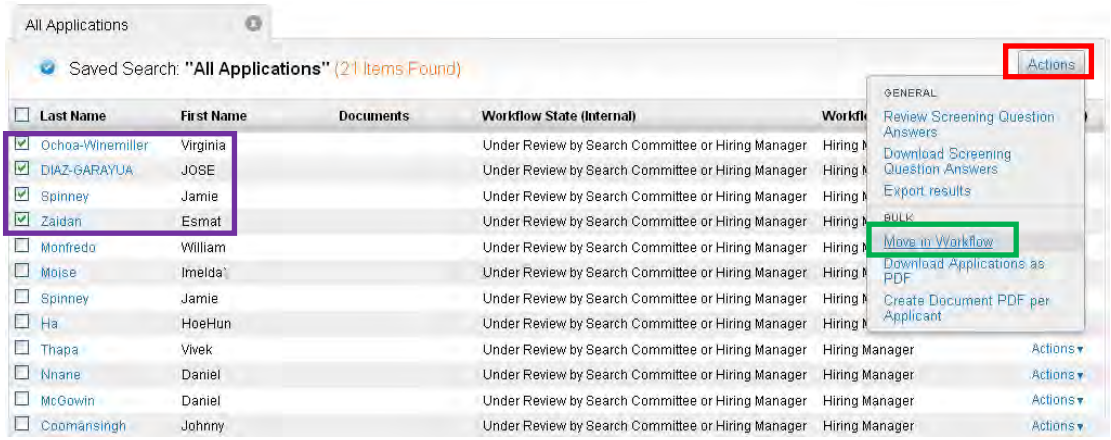


2. **More Intensive Screening** - With this alternate method, you will not Skype, you will simply use a more intensive and specific criteria on those in the semi-finalist group. This criteria will typically be based on preferred qualifications. Those individuals who have the most strengths will be selected for the finalist group.

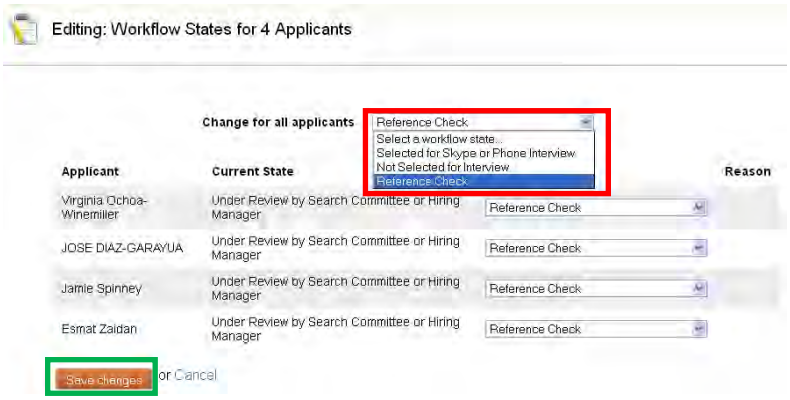
At this stage, a finalist group should be created consisting of 3-5 candidates. You should make sure that all of these individuals are still interested in the position and let them know that they are now moving to the Reference Check phase of the process. You

must receive permission to check any references the applicant did not list in the application. If the applicant says no, you cannot contact any references not listed in the application. Be sure that you develop the questions in advance and that each reference for each candidate is asked the same set of questions.

Note: Remember to move these individuals through the PeopleAdmin system. Under the Applicant tab in the posting, select the individuals who are moving forward to the next phase. Hover over the "Actions" button and select "Move in Workflow.")


All Applications
Saved Search: "All Applications" (21 Items Found)
Actions
GENERAL
Review Screening Question Answers
Download Screening Question Answers
Export results
BULK
Move in Workflow
Download Applications as PDF
Create Document PDF per Applicant
Last Name
First Name
Documents
Workflow State (Internal)
Ochoa-Winemiller Virginia Under Review by Search Committee or Hiring Manager
DIAZ-GARAYUA JOSE Under Review by Search Committee or Hiring Manager
Spinney Jamie Under Review by Search Committee or Hiring Manager
Zaidan Esmat Under Review by Search Committee or Hiring Manager
Monfredo William Under Review by Search Committee or Hiring Manager
Moise Imelda Under Review by Search Committee or Hiring Manager
Spinney Jamie Under Review by Search Committee or Hiring Manager
Ha HoeHun Under Review by Search Committee or Hiring Manager
Thapa Vivek Under Review by Search Committee or Hiring Manager Hiring Manager Actions
Nnane Daniel Under Review by Search Committee or Hiring Manager Hiring Manager Actions
McGowin Daniel Under Review by Search Committee or Hiring Manager Hiring Manager Actions
Coomansingh Johnny Under Review by Search Committee or Hiring Manager Hiring Manager Actions

On the page that you are navigated to, select "Reference Check" from the drop down menu and click "Submit Changes." (Look for success message afterwards to ensure that the action was completed.

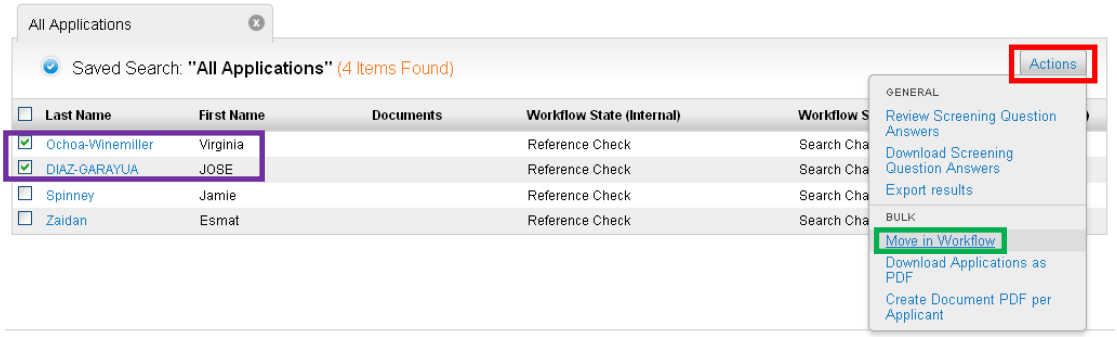

Editing: Workflow States for 4 Applicants
Change for all applicants
Reference Check
Select a workflow state...
Selected for Skype or Phone Interview
Not Selected for Interview
Reference Check
Applicant
Current State
Reason
Virginia Ochoa-Winemiller Under Review by Search Committee or Hiring Manager Reference Check
JOSE DIAZ-GARAYUA Under Review by Search Committee or Hiring Manager Reference Check
Jamie Spinney Under Review by Search Committee or Hiring Manager Reference Check
Esmat Zaidan Under Review by Search Committee or Hiring Manager Reference Check
Save changes
or Cancel

Once the references are contacted and the candidates are cleared, you can begin to schedule on campus, in-person interviews. Again, the interview questions should be predetermined and asked of all applicants. If the candidate needs to be tested, send the Administrative Assistant in Human Resources the interview schedule. The candidate will be scheduled for testing either right before or right after his/her scheduled interview. The results will be emailed to you when they are calculated.

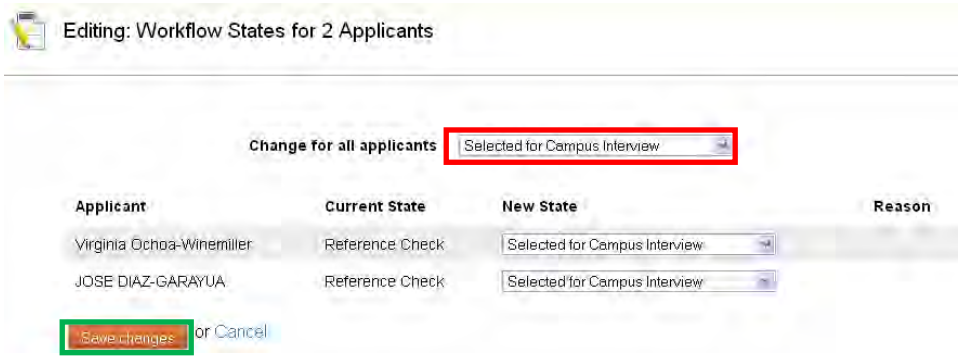
Also, all interviewees will need to complete a Background Check Consent Form. The HR Administrative Assistant will provide you with these forms. You will need to give each candidate a form after the interview, and instruct him/her to complete it. When each

candidate has completed the form, instruct them to immediately seal it in an envelope marked with the candidate's name, position applied for, and the department. Then submit it to Human Resources, where it will be kept in the recruitment file until a final candidate is selected.

Note: When you are scheduling interviews, make sure to continue to move the selected candidates through the PeopleAdmin system. Under the Applicant tab in the posting, select all individuals who were selected for the campus interview. Hover over the "Actions" button and choose "Move in Workflow."

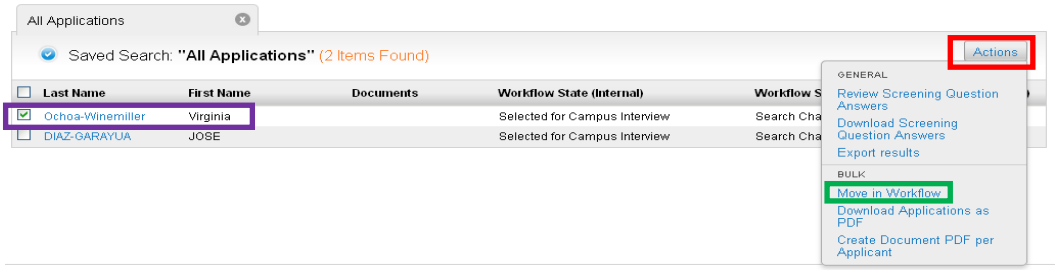


On the page that you are navigated to, choose "Selected for Campus Interview" from the drop down menu and click "Save Changes." *Remember to also move those who were not selected for an interview to "Not selected for interview" as well.

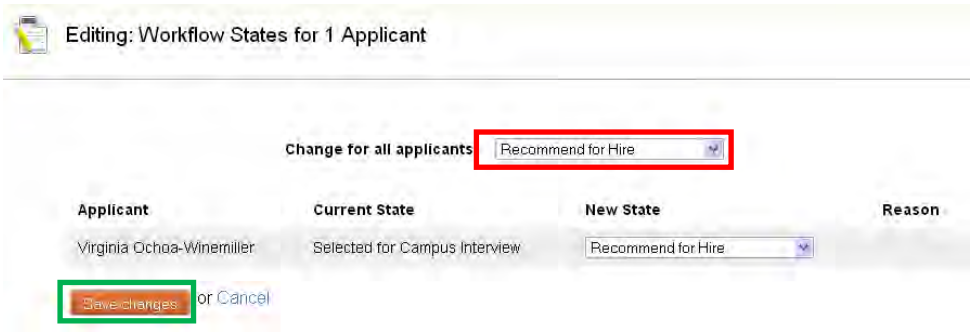


When the interview sessions are completed, you and all of the other committee members should complete an evaluation form for each candidate to assist in the selection process. (Note: If the candidates met with other groups on campus, they should also complete evaluation forms). Essentially, this form is used to clearly identify the strengths and weaknesses considered when selecting the top candidate. **It is not standard practice for the search committee to rank candidates.**

When the final decision about who to hire has been made, you may move forward with the next steps in the hiring process. First, you should move this person to "Recommended for Hire" in the PeopleAdmin system. To do this simply select the candidate, hover over the "Actions" button and click "Move in Workflow."



On the next page, choose "Recommend for Hire" and click "Save Changes."



This action will send an email to Human Resources letting them know that this is the candidate you have selected. Human Resources will then go into the recruitment file, locate that individual's Background Check Consent Form, and process the background check. When the check is complete, Human Resources will email you the results of the background check, and indicate if you can move forward with a verbal offer. Once the offer has been extended and accepted, the search process is over.

Please submit all of your search materials to Human Resources within 30 days of closing the search, unless otherwise noted. The items you need to submit are:

Screening Grid
Reference Questions and Answers
Interview Questions and Answers
Skype Evaluation Forms (if applicable)
Candidate Evaluation Forms

***Reminder: Move the remaining individuals who were not recommended for hire to "Campus Interview, Not selected" in PeopleAdmin.**

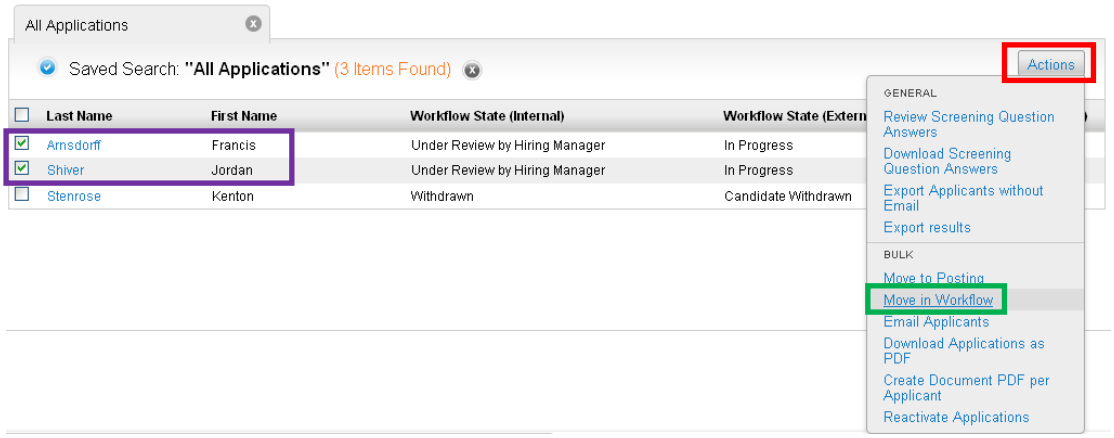
Remember, the following options are available in PeopleAdmin for reviewing your applicant pool:

- To review applicants one at a time, follow the link on each applicant's last name to open the application summary.

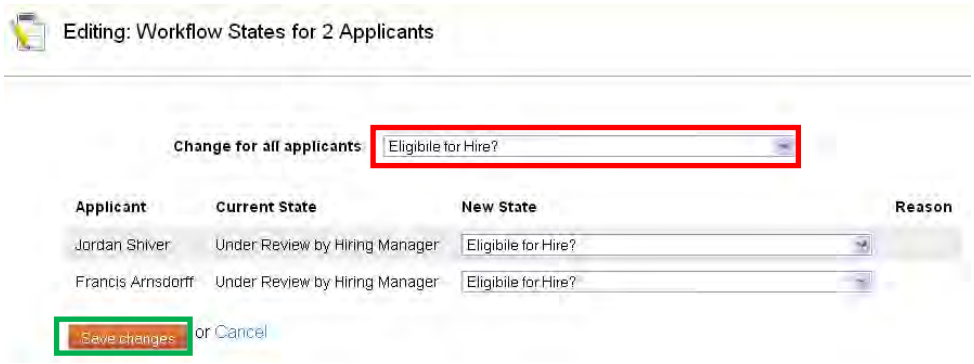
- To review several applicants' documents together:
  - Select the applicants of interest.
  - From the main Actions menu, select **Download Applications as PDFs**. A document selection dialog box will open.
  - Select the types of applicant documents you want to include, and select **Submit**. The system will generate a PDF file that includes documents for all selected applicants.

Helpful Tip: See also page 61 at the end of this document for the Process Flow Chart 3A: Hiring Process (Faculty-Staff).

Students and Part Time - The Hiring Manager is in charge of all prescreening for the candidates who apply for student positions. After you narrow your pool to the applicants who meet your minimum requirements, move these applicants to "Eligible for Hire" in PeopleAdmin. To do this, go to the Applicants tab under the posting. Select all of the applicants that you want to move, click the "Actions" button and select "Move in Workflow."

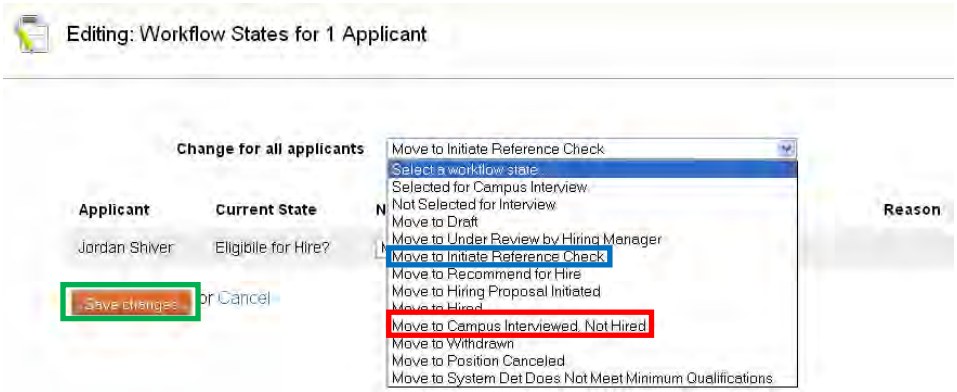


Once you are navigated to the next page, select "Eligible for Hire?" from the drop down menu at the top of the page then click "Save Changes."



At this point, the Human Resources representative who is in charge of student workers will determine if the individuals you selected are in fact eligible for hire. Essentially, he/she will check to make sure that the student is enrolled in enough classes to be eligible to be a student worker. If the candidates are ineligible, they will be moved to "Not Selected for Interview." If they are eligible, they will be moved to "Selected for Campus

Interview" in PeopleAdmin. Once all desired candidates have been moved to "Selected for Campus Interview," you can proceed with the interview process.



After you have conducted the interviews and selected who you want to hire, you will need to direct the selected student to the New Employee Orientation page on the Human Resources website. Instruct him/her on what forms to fill out and to turn in his/her New Employee packet to Human Resources.. You will need to move this student to "Initiate Reference Check" in the PeopleAdmin system. To do this, select the individual and move him/her in the workflow. After you are directed to the next page, select "Move to Initiate Reference Check" from the drop down menu at the top. Then click "Save Changes."

Don't forget to move the individuals who were not selected for hire, as well. The steps are the same, except that you will select "Move to Campus Interviewed, Not Hired" and then click "Save Changes."

Once the new hire's New Employee packet has been submitted and verified for completeness, Human Resources will move this individual to "Hired" in PeopleAdmin and close the position. . Then Human Resources will perform the background check, and let you know when your new hire can begin working.

Helpful Tip: See also page 62 at the end of this document for the Process Flow Chart 3B: Hiring Process (Student-PT).

Filling a Position

Once a candidate is hired, it is necessary that the posting be marked as "Filled." Filling a position is a Human Resources function, but this action cannot be taken until all of the applicants have been transitioned in PeopleAdmin to a final disposition. By remembering to move applicants in PeopleAdmin through every phase, you can ensure that this process works smoothly, both for you and for Human Resources.

There are two options available when filling a posting. It can either be marked as **"Filled" or "Unfilled."**

a) **Filled** - Marking a position as "Filled" means that a suitable candidate was found and has been officially hired for that position. Once moved to this state, the position is closed and archived.
b) **Unfilled** - Marking a posting as "Unfilled" that means that the search did not yield a suitable candidate.

Cancelled Positions

It is not often that a position will be cancelled, but you may decide not to fill a position or decide that the posting details need to be edited. Once a posting has applicants, any changes to the posting details will require that the position be cancelled. A new posting will need to be created in PeopleAdmin, and the position will need to be re-advertised.

FREQUENTLY ASKED QUESTIONS

Login Questions

How do I create an account with PeopleAdmin?

1. **Although the system gives you the option to request a user account, it is recommended that all user accounts be created by Human Resources. Please do not attempt to open an account on your own.** When you are ready to begin using PeopleAdmin, please contact Human Resources and a representative will create an account for you. At the initial setup, you will be assigned a username. The username will always follow the following format: first six letters of last name, first two letters of first name, all lowercase, all together as one word. For example, if your name is Amy Johnson, your username will be "johnsoam." The username must always have eight characters so if your last name does not have six or more letters, then extra letters will be taken from your first name to meet the character requirement. For example, John Smith's username would be "smithjoh."

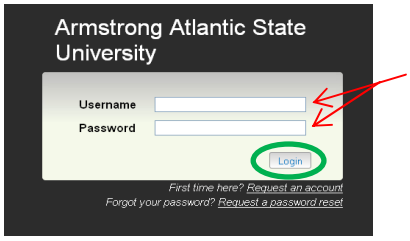
2. Your initial password will be the same as your username. However, upon initial login to the system, you will be prompted to change the password once again, this time, to something of your choosing.

3. The Human Resources representative will also assign you to a specific group based on your position. This grouping will dictate the various user privileges, levels of access (e.g. manage, delete, create, update, or view), features and capabilities to which you will have access. The user privileges in the system that will be granted to you will provide access to the tasks that are relevant to your work. The set of privileges associated with your particular group are called group permissions. Each set of group permissions specifies which position types can be accessed. For example, if you have a group permission that does not apply to faculty, you will not be able to see any information associated with faculty while you are signed in using your group permission. The most commonly assigned groups are Dean/Director, Hiring Manager, Search Chair, and Search Committee Member.

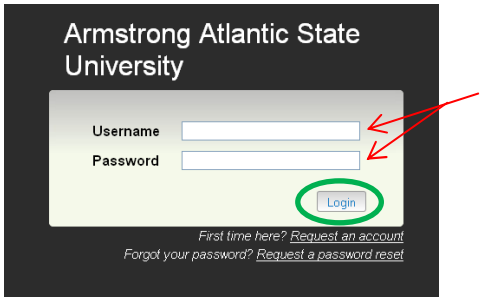
4. When the process of creating the user account is complete, PeopleAdmin will email you a welcome to the program to get you started, reminding you of your username and password and giving you the web address to access PeopleAdmin.

How do I log in to my PeopleAdmin account?

Type your username and password into the designated spaces and click "Login." This will take you to your homepage within the PeopleAdmin program.

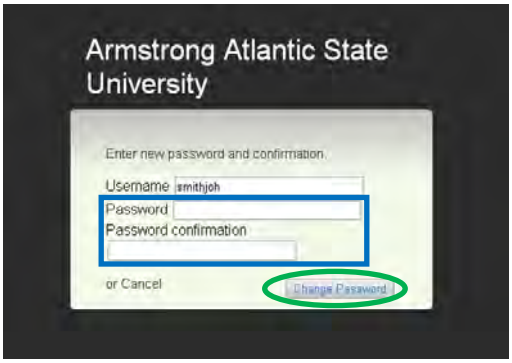


How do I log in for the first time?



Type your username and password into the designated spaces and click "Login."

Helpful Tip for FIRST TIME USERS: You will need to complete step one above with the information that HR provided to you. However, once you enter this information, you will be prompted to reset your password.



- Your username should automatically appear in the "username" field. If it does not, simply type it into this field.
- Enter your desired password into both the "Password" and "Password confirmation" fields.
- Click "Change Password."

*Once your password is reset, you will then be directed to the homepage.

I am having trouble logging in to my PeopleAdmin account and/or I can't remember my username/password. What do I do?

*Trouble logging in-Possible Solutions:

1. The login to PeopleAdmin is case-sensitive. Make sure you do not have Caps Lock turned on.
2. Be certain that you are logging in to the Hiring Managers' site, not the Applicant site.
3. You may be entering an extra space within your username (or not entering a space where there should be one). Ask HR to look up your username in the system and verify it with you.
   - ❖ If the problem persists, contact the Human Resources department.

*Forgotten password- Possible Solutions:

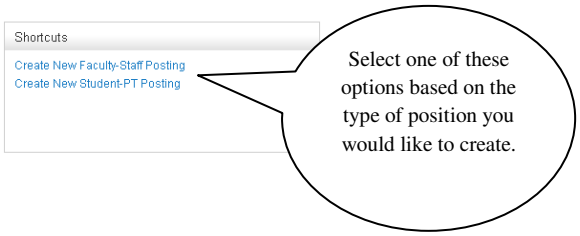
1. See login solutions above
   - ❖ If the problem persists, ask Human Resources to verify your username and to re-set your password. Once your password is re-set, it will be the same as your username. PeopleAdmin will then prompt you to change it.

Posting Questions

How do I start the process of creating a posting?

There are two ways to begin the process of creating a posting:

a. The easiest way is to go to the "Shortcuts" section of the homepage and click the link for the type of posting you wish to create.


Shortcuts
Create New Faculty-Staff Posting
Create New Student-PT Posting
Select one of these options based on the type of position you would like to create.

b. You can also go to the "Postings" tab and select the type of position you want to create. Then click on the "Create New Posting" button in the top right corner of the screen.

- ❖ For the complete process of creating a posting, see Job Posting, starting on page 12.

What does it mean to create a posting from "position type"?

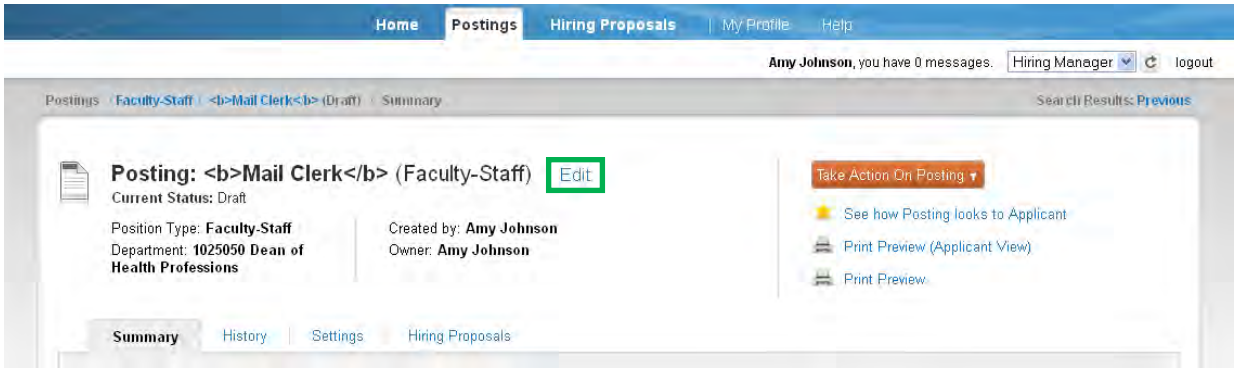
If you select to create the posting from this option, it will only fill in the information that is relevant to your department and Armstrong. Essentially, this is a blank template to be completed without any information automatically populated. You will have to input the majority of the information for your posting.

What does it mean to create a posting from "title"?

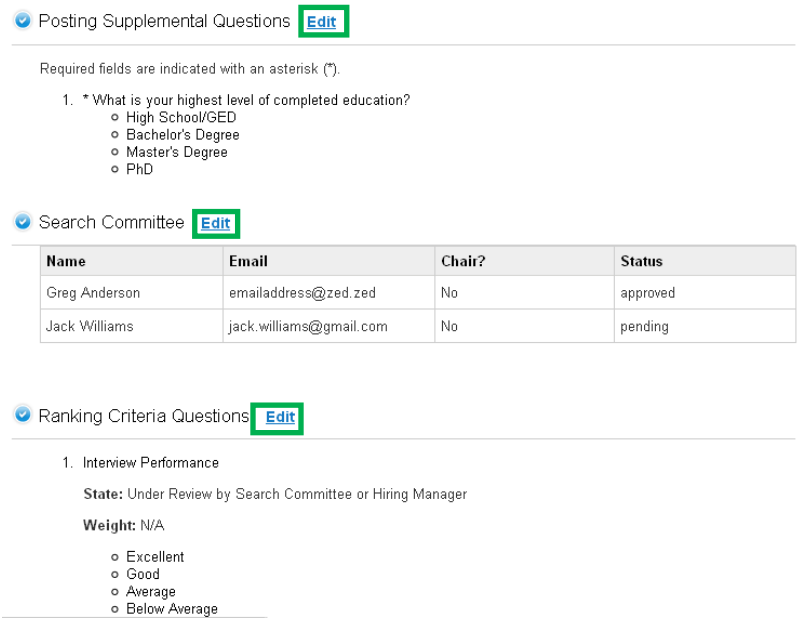
This option will use a template within the system based on the title of the position you want to create. Creating a posting from a title populates nature of work, essential duties, minimum qualifications, and preferred qualifications (if applicable). For example, if you want to create a posting for a Mail Clerk, you will search for Mail Clerk in the list of titles.

How do I modify/edit a posting?

Only Hiring Managers can edit postings, and this can only be done while they are the workflow state owners. If you have this access and you notice changes that need to be made as you are reviewing the summary of your posting, click the "Edit" link at the top of the page next to the title of the position. This page will allow you to start from the first section of the posting and edit the desired information.



However, if you only want to make changes in a specific part of the posting, you have the option to skip right to that section for editing. On the "Posting Summary" page, click on the "Edit" link next to the name of the section that you wish to modify. This will take you directly to that particular posting page to edit.



How can I keep track of a posting once it is out of my workflow state?

You can add postings to your Watch List to keep track of them. This area allows you to keep an eye on postings that are relevant to your department or postings that you are interested in tracking. It allows you to follow the progress of any items that matter to you, even if they are owned by other users. The Watch List displays where the posting is in the workflow and the current owner of that workflow state. You can also choose to stop watching an item at any time.

Who is the next approver in the posting process following myself?

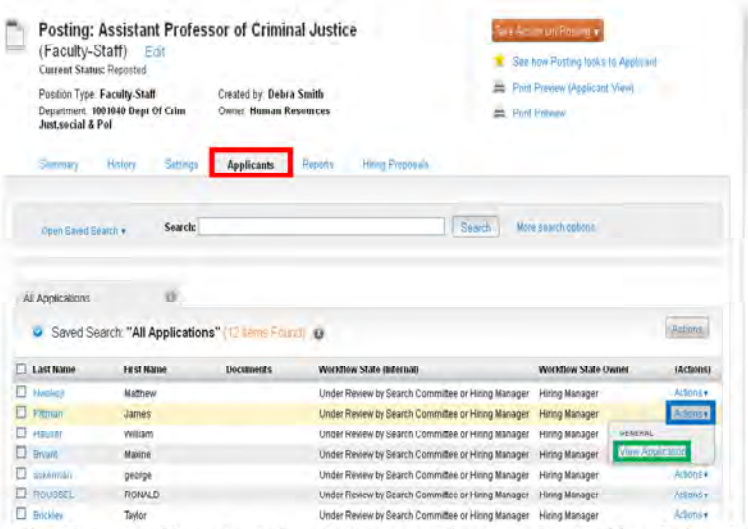
The workflow for approving a posting is as follows:

Applicant Questions

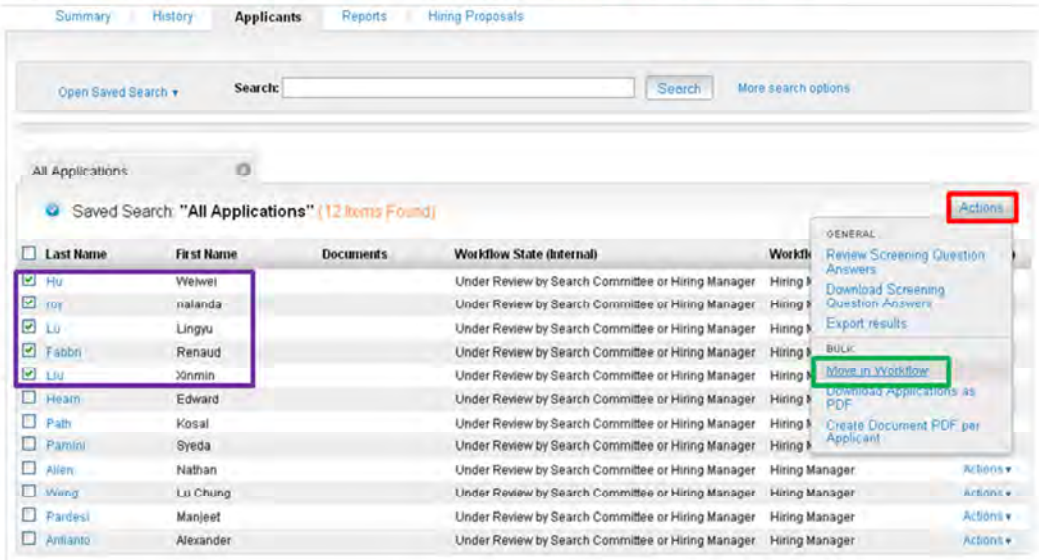
How do I access my applicant pool?

Within the PeopleAdmin system, you have the ability to monitor and manage the people who have applied for your posting. Under the "Applicants" tab, you will see a list of all of the individuals who have applied for that particular posting and you will be able to view and manage their applications. From here, you will be able to see a summary of information about the applicants, such as their names, the number of attached documents, and the workflow states of the applications.

How do I bulk dispense applicants?



In the applicants tab of the posting, select all of the individuals that you would like to move on in the process by checking the boxes next to their names. Hover over the "Actions" button and then select "Move in Workflow."

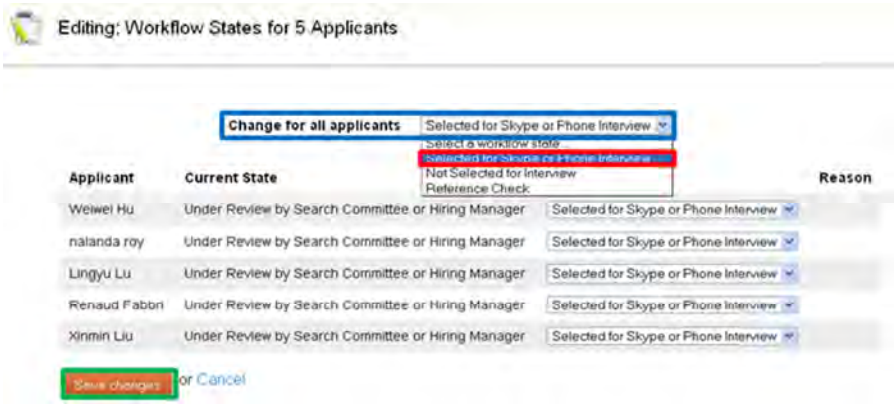


You will then be directed to the page where you can edit the workflow states of all the applicants selected. Since these individuals were selected to move forward, select the "Change for all applicants" drop down menu at the top of the page and choose "Selected for Skype or Phone Interview." This will change the state of all the applicants on the page. Click "Save Changes" to complete this action.

> **Helpful Tip:** If the Hiring Manager or Search Chair overlooked *even one person* in the applicant pool the bulk function for moving applicants through the workflow **will not work.** This is why it is important to move individuals through each step in the process. If you take all of the necessary steps throughout the process, you will have less to do when the hiring process is over.

Can I delete applicants?

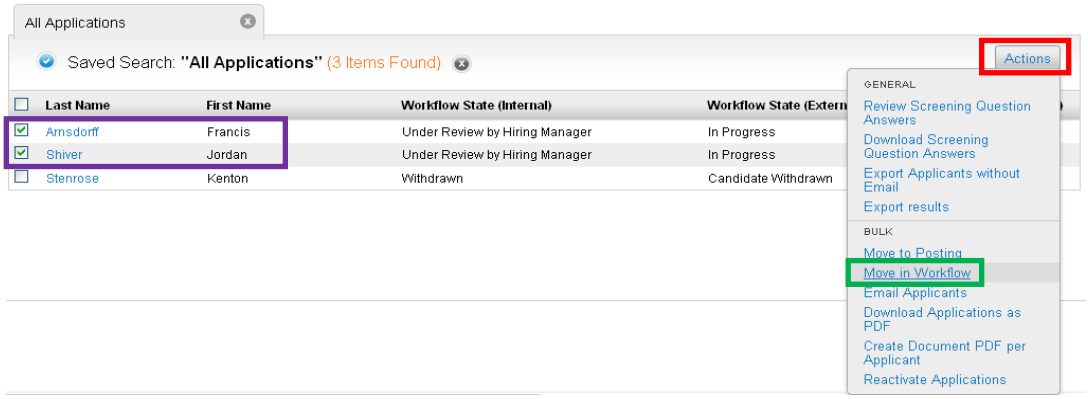
No, applicants cannot be deleted from the system. Instead, you should move them to the status that corresponds with the decision made about them. For example, if an applicant does not meet the minimum qualifications for the position, you can move them to a workflow state that reflects that this individual did not meet the minimum requirements and is no longer in the running for the position.


Editing: Workflow States for 5 Applicants
Change for all applicants
Selected for Skype or Phone Interview
Select a workflow state
Selected for Skype or Phone Interview
Not Selected for Interview
Reference Check
Applicant
Current State
Reason
Weiwei Hu
Under Review by Search Committee or Hiring Manager
Selected for Skype or Phone Interview
nalanda roy
Under Review by Search Committee or Hiring Manager
Selected for Skype or Phone Interview
Lingyu Lu
Under Review by Search Committee or Hiring Manager
Selected for Skype or Phone Interview
Renaud Fabbri
Under Review by Search Committee or Hiring Manager
Selected for Skype or Phone Interview
Xinmin Liu
Under Review by Search Committee or Hiring Manager
Selected for Skype or Phone Interview
Save changes
or Cancel

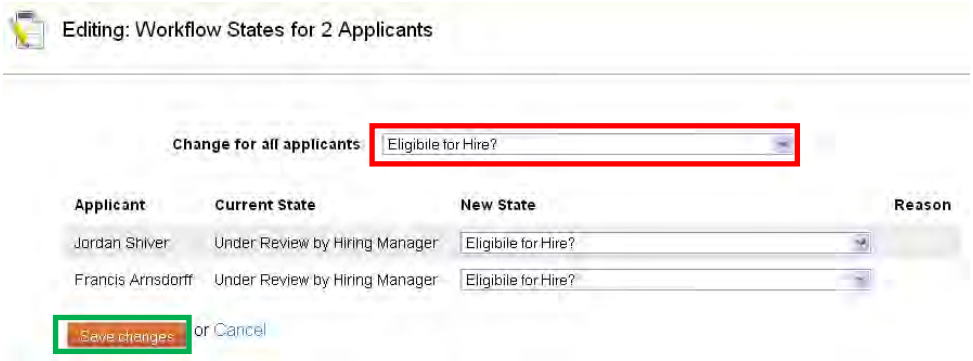
Hiring Process Questions

What is the hiring process for Student/Part time?

The Hiring Manager is in charge of all prescreening for the candidates who apply for student positions. After you narrow your pool to the applicants who meet your minimum requirements, move these applicants to "Eligible for Hire" in PeopleAdmin. To do this, go to the Applicants tab under the posting. Select all of the applicants that you want to move, click the "Actions" button and select "Move in Workflow."



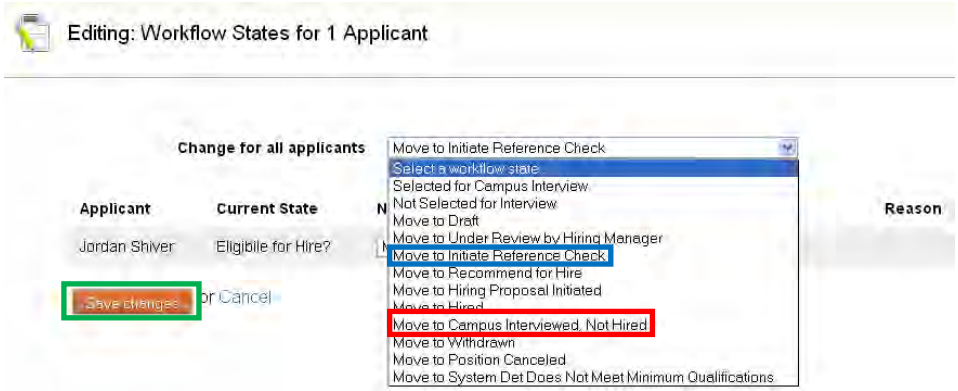
Once you are navigated to the next page, select "Eligible for Hire?" from the drop down menu at the top of the page then click "Save Changes."



At this point, the Human Resources representative who is in charge of student workers will determine if the individuals you selected are in fact eligible for hire. Essentially, he/she will check to make sure that the student is enrolled in enough classes to be eligible to be a student worker. If the candidates are ineligible, they will be moved to "Not Selected for Interview." If they are eligible, they will be

moved to "Selected for Campus Interview" in PeopleAdmin. Once all desired candidates have been moved to "Selected for Campus Interview," you can proceed with the interview process.

After you have conducted the interviews and selected who you want to hire, you will need to direct the selected student to the New Employee Orientation page on the website. Instruct him/her on what forms to fill out and To turn in his/her New Employee packet to Human Resources..



You will need to move this student to "Initiate Reference Check" in the PeopleAdmin system. To do this, select the individual and move him/her in the workflow. After you are directed to the next page, select "Move to Initiate Reference Check" from the drop down menu at the top. Then click "Save Changes."

Don't forget to move the individuals who were not selected for hire as well. The steps are the same, except that you will select "Move to Campus Interviewed, Not Hired" and then click "Save Changes."

Once the new hire's New Employee packet has been submitted and verified for completeness, Human Resources will move this individual to "Hired" in PeopleAdmin and close the position. Human Resources will perform the background check and let you know when your new hire can begin working.

*__Note__**:** See Process Flow Chart 3B: Hiring Process (Student-PT) on pg. 62.

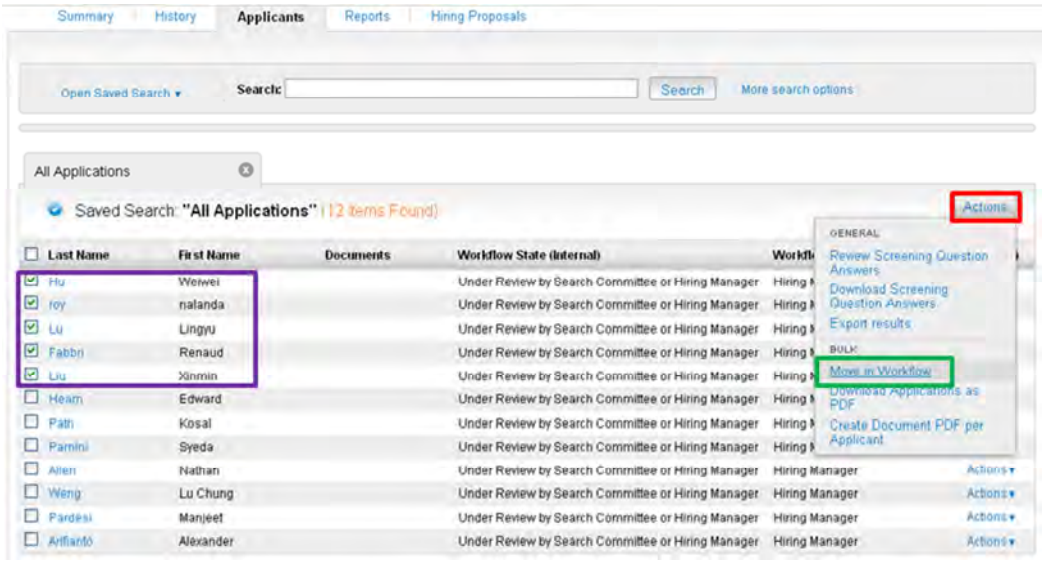
What is the hiring process for Faculty/Staff?

The same process applies to all professional/administrative and faculty positions. The first step is to specify a "Review of Application Date" in the "Special Instructions" section of the posting. The purpose of this field is to inform the applicants when the

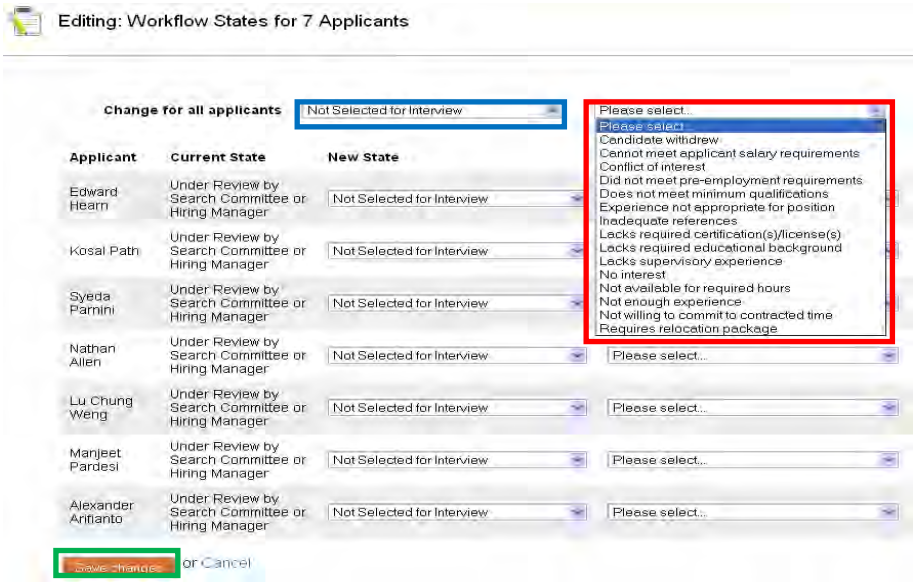
review of applications will begin so that they can submit their applications by this date. Also, the posting will need to be advertised at least three weeks prior to the "Review of Application Date," to give applicants sufficient time to submit their materials.

As you are reviewing the applications, you will complete a Screening Grid. This grid will include all of the applicants whose applications were submitted by the review date.Once you complete the grid, you will be able to compare the skills and abilities of each applicant to the minimum qualifications of the position. Then you will narrow the applicant pool until you reach a semi-finalist group, usually consisting of about 5-10 applicants.

***Note:** All applicants will need to be moved through the PeopleAdmin workflow based on each decision made. In the applicants tab of the posting, select all of the individuals that you would like to move forward in the process by checking the boxes next to their names. Hover over the "Actions" button and then select "Move in Workflow."



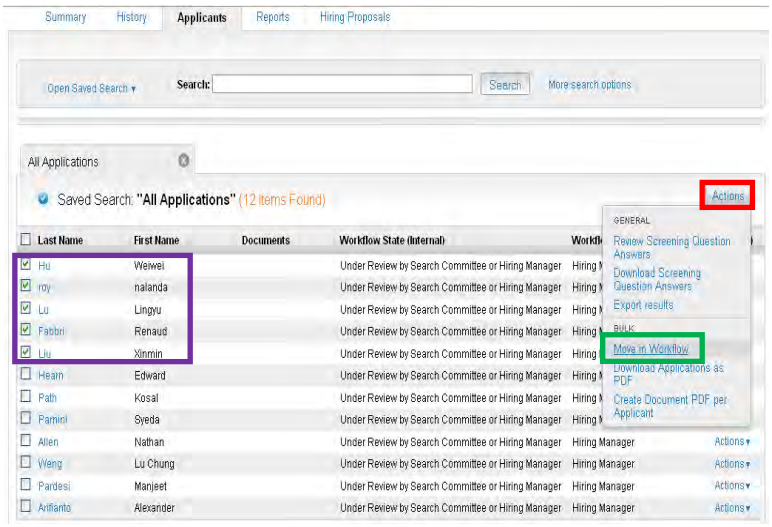
All applicants who do not make the cut to the next round should be moved to "Not Selected for Interview," which can be found in the drop down menu. You will be asked to select a reason from the choices that will appear. If the reasons are different for each candidate, you will need to perform this step individually. When finished, select "Save Changes."A success message should appear at the top of the screen stating that the transition process has started and may take a few minutes.



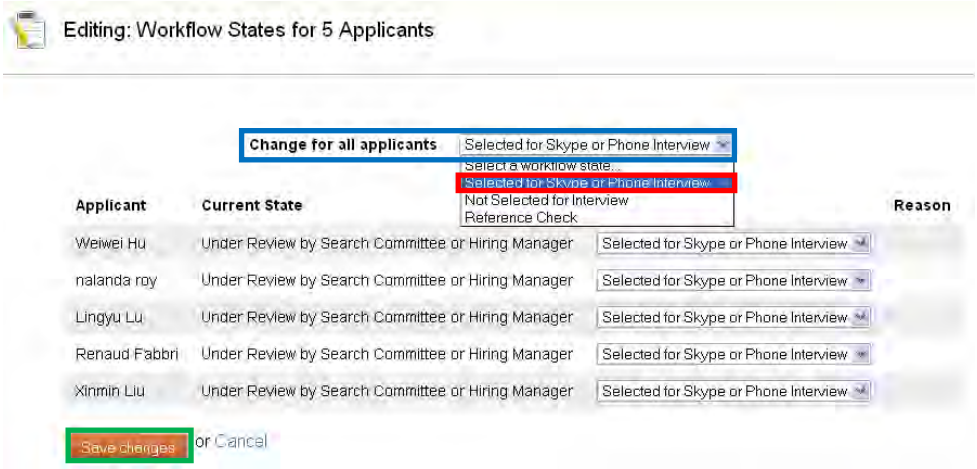
Following this step, you will then work towards narrowing the pool down to about 3-5 people for the finalist group. There are two options for narrowing the pool at this stage:

1. Conduct Skype Interviews- With this option, you will create a finalist group by conducting Skype interviews with all of the individuals in your semi-finalist group. At this point you should prepare your questions. Make sure that all applicants are asked the same questions during the interviews.

   ***Note:** All individuals will need to be moved through the PeopleAdmin workflow at each stop in this process. The 5-10 candidates who were selected to be narrowed down should be moved to "Selected for Skype Interview." In the applicants tab of the posting, select all of the individuals that you would like to move on in the process by checking the boxes next to their names. Hover over the "Actions" button and then select "Move in Workflow."



You will then be directed to the page where you can edit the workflow states of all the applicants selected. For these individuals who were selected to move forward, select the "Change for all applicants" drop down menu at the top of the page and choose "Selected for Skype or Phone Interview." This will change the state of all the applicants on the page to Selected for Skype or Phone Interview and you can click "Save Changes" to complete this action. A success message should appear at the top of the screen stating that the transition process has started and may take a few minutes.

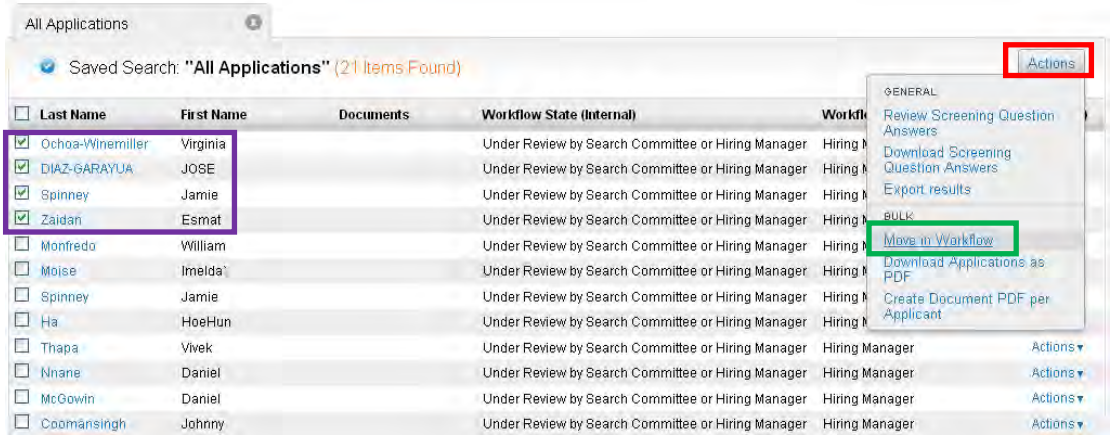


2. More Intensive Screening- With this alternative method, you will not Skype, you will simply use a more intensive and specific criteria on those in the semi-finalist group. This criteria will typically be based on preferred qualifications. Those individuals who have the most strengths will be selected for the finalist group.

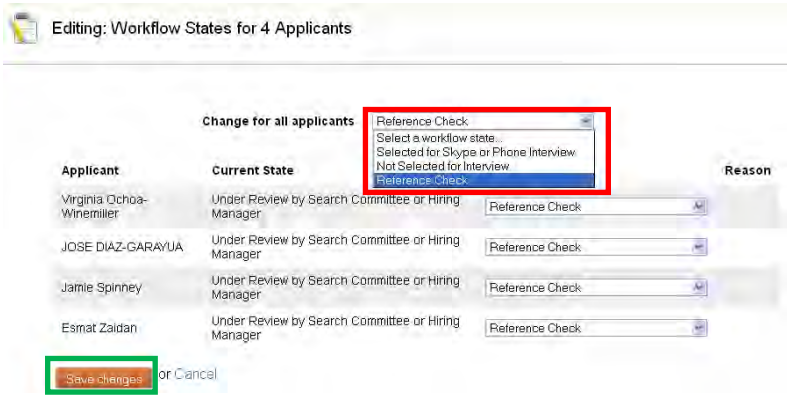
AT this stage, a finalist group should be created of 3-5 candidates. You should make sure that all of these individuals are still interested in the position and let them know that they

are now moving to the Reference Check phase of the process. You must receive permission to check any references the applicant did not list in the application. If the applicant says no, you cannot contact any references not listed in the application. Be sure that you develop the questions in advance and that each reference for each candidate is asked the same set of questions.

Note: Remember to move these individuals through the PeopleAdmin system. Under the Applicant tab in the posting, select the individuals who are moving forward to the next phase. Hover over the "Actions" button and select "Move in Workflow."


All Applications
Saved Search: "All Applications" (21 Items Found)
Actions
GENERAL
Review Screening Question Answers
Download Screening Question Answers
Export results
BULK
Move in Workflow
Download Applications as PDF
Create Document PDF per Applicant
Last Name
First Name
Documents
Workflow State (Internal)
Ochoa-Winemiller Virginia Under Review by Search Committee or Hiring Manager
DIAZ-GARAYUA JOSE Under Review by Search Committee or Hiring Manager
Spinney Jamie Under Review by Search Committee or Hiring Manager
Zaidan Esmat Under Review by Search Committee or Hiring Manager
Monfredo William Under Review by Search Committee or Hiring Manager
Moise Imelda Under Review by Search Committee or Hiring Manager
Spinney Jamie Under Review by Search Committee or Hiring Manager
Ha HoeHun Under Review by Search Committee or Hiring Manager
Thapa Vivek Under Review by Search Committee or Hiring Manager Hiring Manager Actions
Nnane Daniel Under Review by Search Committee or Hiring Manager Hiring Manager Actions
McGowin Daniel Under Review by Search Committee or Hiring Manager Hiring Manager Actions
Coomansingh Johnny Under Review by Search Committee or Hiring Manager Hiring Manager Actions

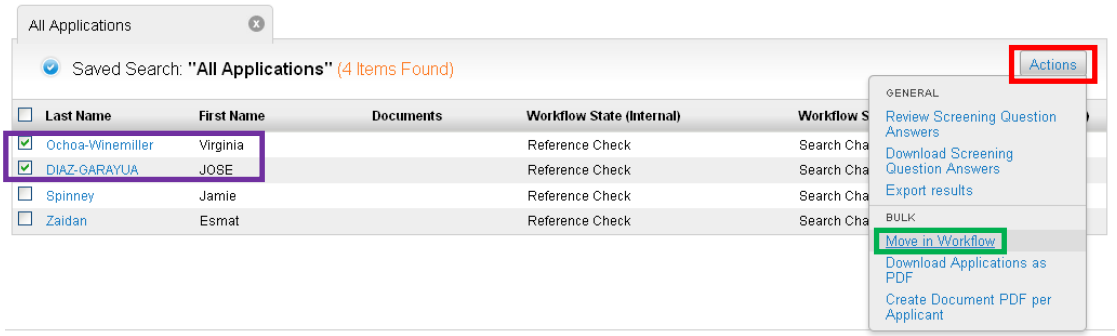
On the page that you are navigated to, select "Reference Check" from the drop down menu and click "Submit Changes." (Look for success message afterwards to ensure that the action was completed.)


Editing: Workflow States for 4 Applicants
Change for all applicants
Reference Check
Select a workflow state...
Selected for Skype or Phone Interview
Not Selected for Interview
Reference Check
Applicant
Current State
Reason
Virginia Ochoa-Winemiller Under Review by Search Committee or Hiring Manager Reference Check
JOSE DIAZ-GARAYUA Under Review by Search Committee or Hiring Manager Reference Check
Jamie Spinney Under Review by Search Committee or Hiring Manager Reference Check
Esmat Zaidan Under Review by Search Committee or Hiring Manager Reference Check
Save changes
or Cancel

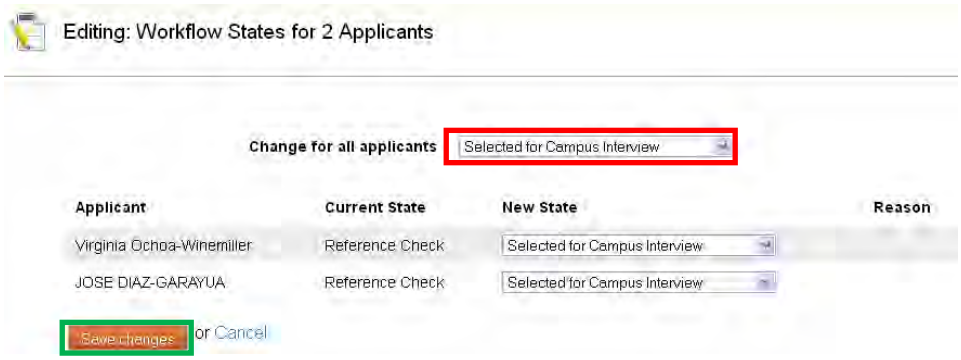
Once the references are contacted and the candidates are cleared, you can begin to schedule on campus, in-person interviews. Again, the interview questions should be predetermined and asked of all applicants. If the candidate needs to be tested, send the Administrative Assistant in Human Resources the interview schedule. She will schedule their testing either right before or right after his/her scheduled interview. The results will be emailed to you when they are calculated. Also, all interviewees will need to complete a Background Check Consent Form. The HR Administrative Assistant will provide you with these forms. You will need to give each candidate a form after the interview, and instruct him/her to complete it. When each candidate has completed the form, instruct

them to immediately seal it in an envelope marked with the candidate's name, position applied for, and the department and submit it to Human Resources, where it will be kept in the recruitment file until a final candidate is selected.

***Note: When you are scheduling interviews, make sure to continue to move the selected candidates through the PeopleAdmin system. Under the Applicant tab in the posting, select all individuals who were selected for the campus interview. Hover over the "Actions" button and choose "Move in Workflow."**

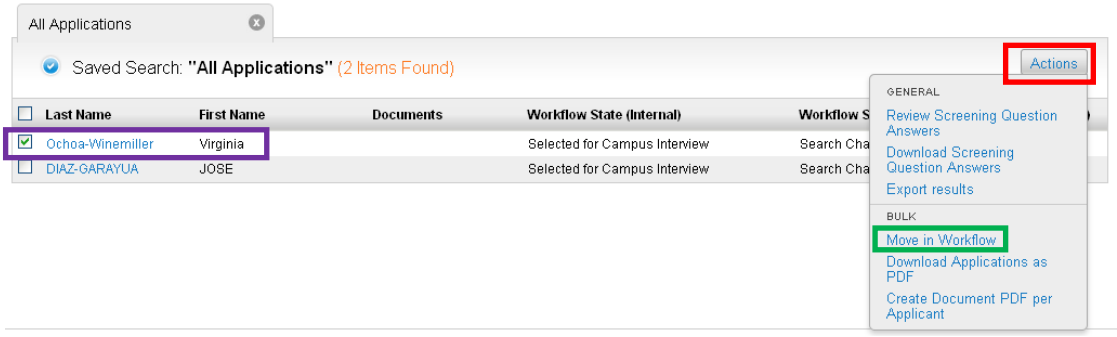


On the page that you are navigated to, choose "Selected for Campus Interview" from the drop down menu and click "Save Changes." *Remember to also move those who were not selected for an interview to "Not selected for interview" as well.

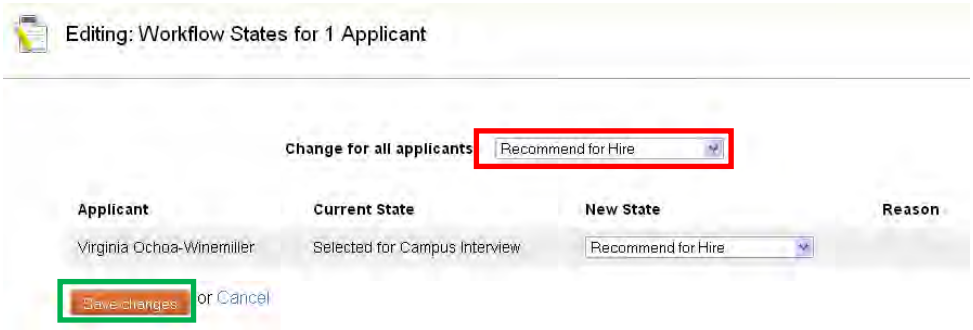


When the interview sessions are completed, you and all of the other committee members should complete an evaluation form for each candidate to assist in the selection process. (Note: If the candidates met with other groups on campus, they should also complete evaluation forms). Essentially, this form is used to clearly identify the strengths and weaknesses considered when selecting the top candidate. **It is not standard practice to rank candidates.**

When the final decision about who to hire has been made, you may move forward with the next steps in the hiring process. First, you should move this person to "Recommended for Hire" in the PeopleAdmin system. To do this simply select the candidate, hover over the "Actions" button and click "Move in Workflow."



On the next page, choose "Recommend for Hire" and click "Save Changes."



This action will send an email to Human Resources letting them know that this is the candidate you have selected. Human Resources will then go into the recruitment file, locate that individual's Background Check Consent Form, and process the background check. When the check is complete, Human Resources will email you the results of the background check, and indicate if you can move forward with a verbal offer. Once the offer has been extended and accepted, the search process is over.

What documents am I supposed to turn in to Human Resources after the search process is complete?

Please submit all of your search materials to Human Resources within 30 days of closing the search, unless otherwise noted. The items you need to submit are:

- Screening Grid
- Reference Questions and Answers
- Interview Questions and Answers
- Skype Evaluation Forms (if applicable)
- Candidate Evaluation Forms

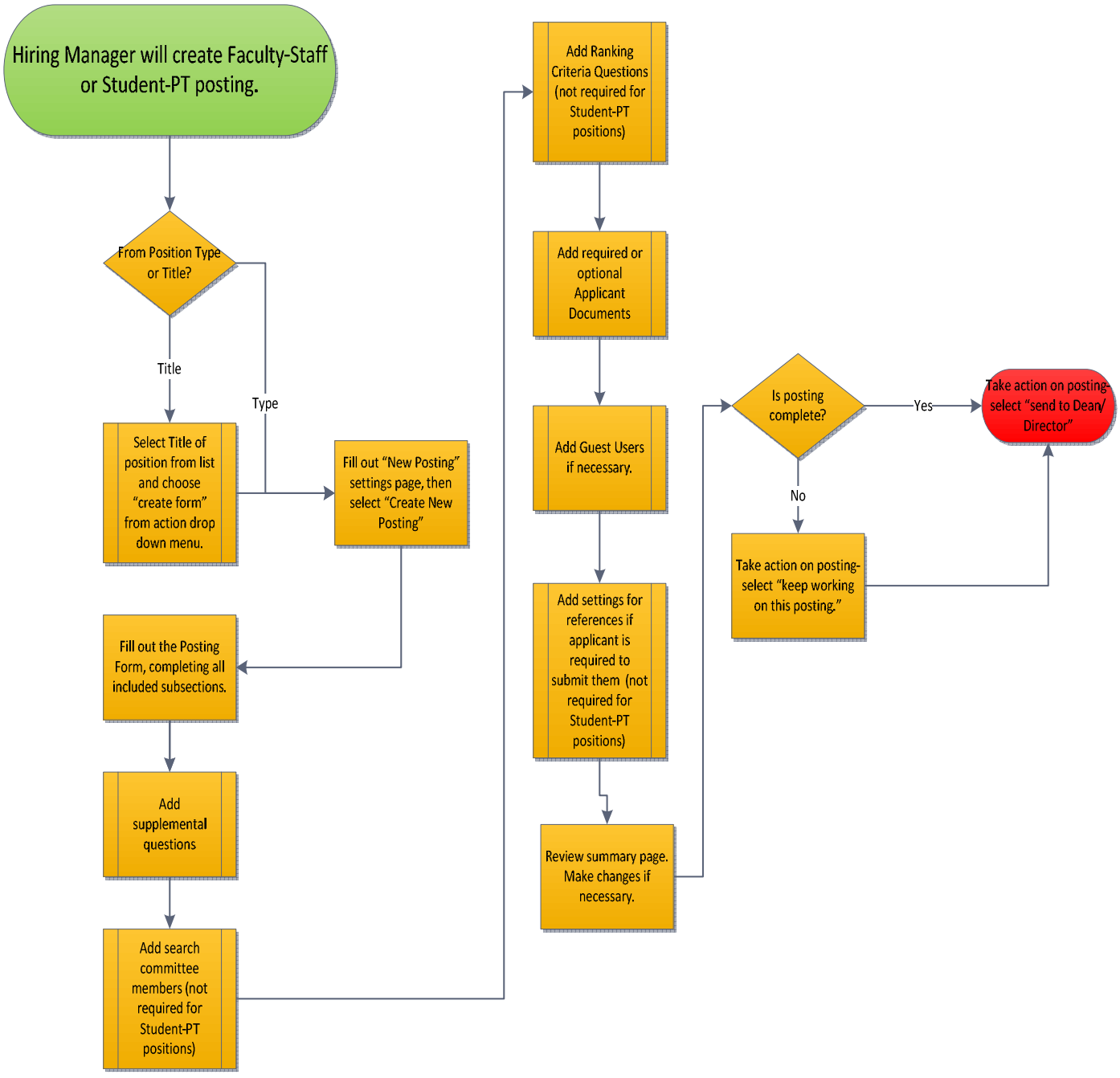
Miscellaneous Questions

Do I still have to fill out a Position Request Form (PRF)?

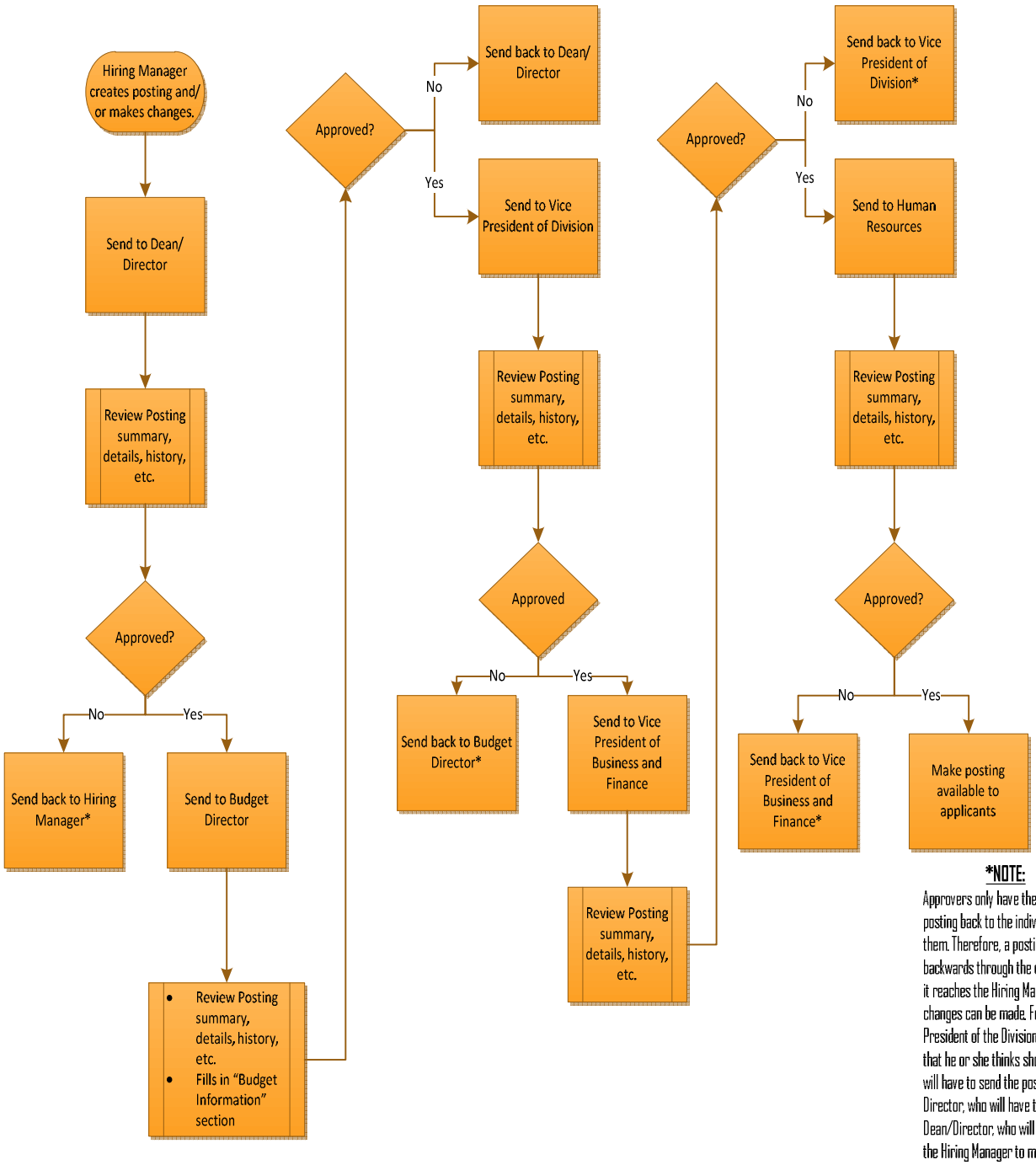
No, the PRF has been replaced by PeopleAdmin.

PROCESS FLOW CHARTS

Process Flow Chart 1: Creating a Posting


Hiring Manager will create Faculty-Staff or Student-PT posting.
From Position Type or Title?
Title
Type
Select Title of position from list and choose "create form" from action drop down menu.
Fill out "New Posting" settings page, then select "Create New Posting"
Fill out the Posting Form, completing all included subsections.
Add supplemental questions
Add search committee members (not required for Student-PT positions)
Add Ranking Criteria Questions (not required for Student-PT positions)
Add required or optional Applicant Documents
Add Guest Users if necessary.
Add settings for references if applicant is required to submit them (not required for Student-PT positions)
Review summary page. Make changes if necessary.
Is posting complete?
Yes
No
Take action on posting- select "send to Dean/ Director"
Take action on posting- select "keep working on this posting."

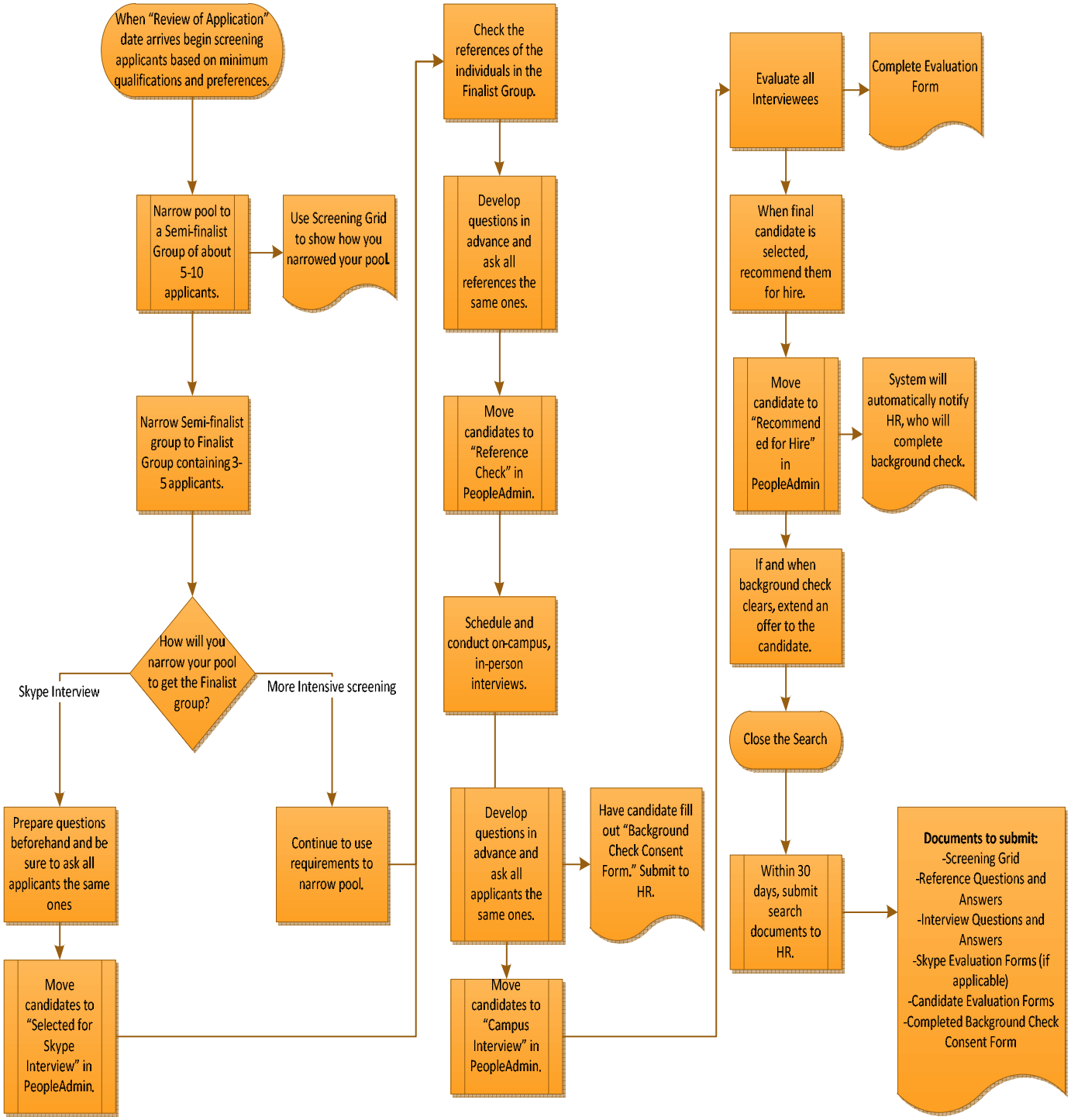
Process Flow Chart 2: Approval Process



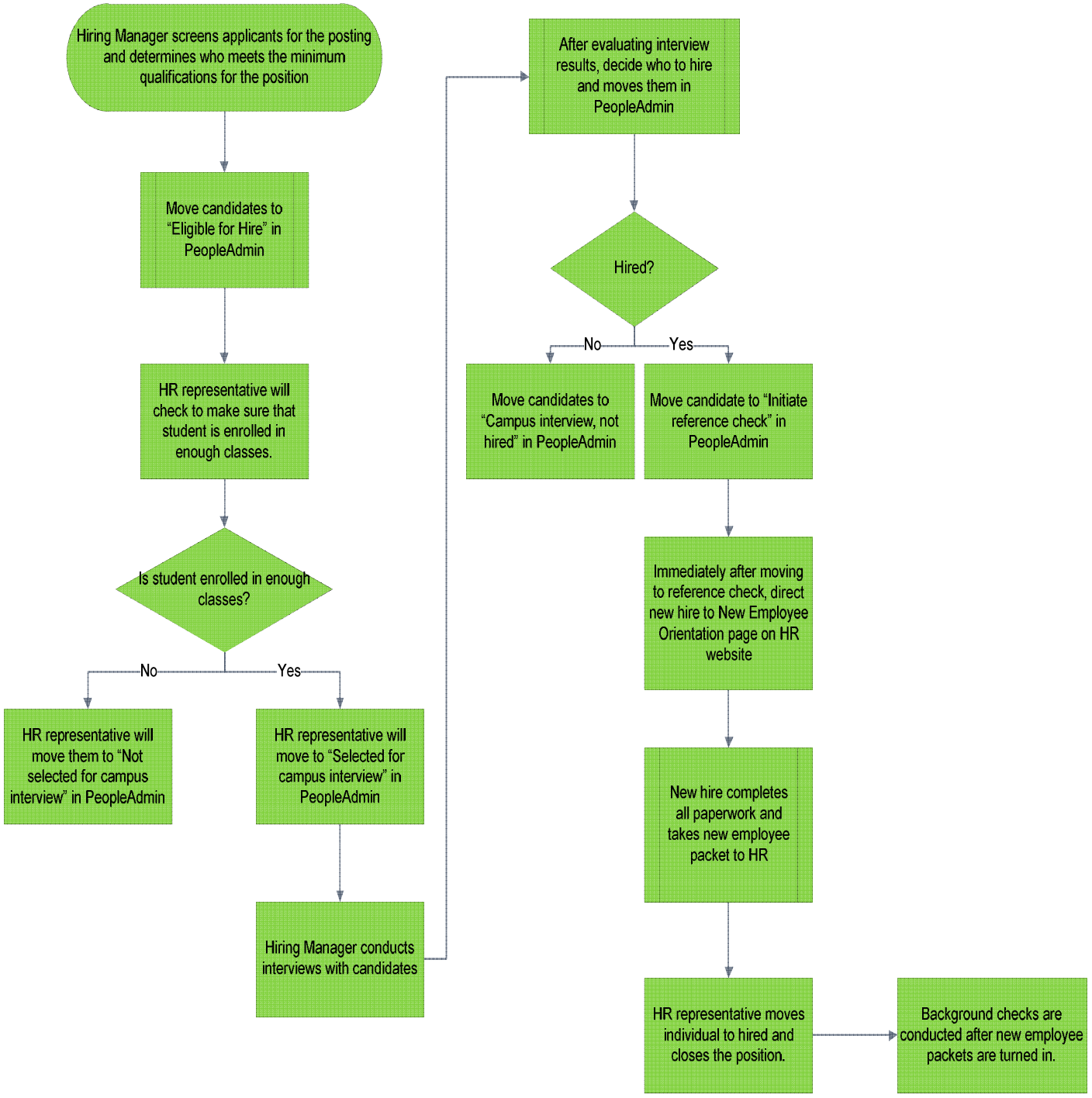
***NOTE:**

Approvers only have the option to send the posting back to the individual who sent it to them. Therefore, a posting will have to go backwards through the chain of command until it reaches the Hiring Manager again before changes can be made. For example, if the Vice President of the Division notices something that he or she thinks should be revised, they will have to send the posting back to the Budget Director, who will have to send it back to the Dean/Director, who will then send it back to the Hiring Manager to make the necessary changes.

Process Flow Chart 3A: Hiring Process (Faculty-Staff)


When "Review of Application" date arrives begin screening applicants based on minimum qualifications and preferences.
Narrow pool to a Semi-finalist Group of about 5-10 applicants.
Use Screening Grid to show how you narrowed your pool
Narrow Semi-finalist group to Finalist Group containing 3-5 applicants.
How will you narrow your pool to get the Finalist group?
Skype Interview
More Intensive screening
Prepare questions beforehand and be sure to ask all applicants the same ones
Move candidates to "Selected for Skype Interview" in PeopleAdmin.
Continue to use requirements to narrow pool.
Check the references of the individuals in the Finalist Group.
Develop questions in advance and ask all references the same ones.
Move candidates to "Reference Check" in PeopleAdmin.
Schedule and conduct on-campus, in-person interviews.
Develop questions in advance and ask all applicants the same ones.
Have candidate fill out "Background Check Consent Form." Submit to HR.
Move candidates to "Campus Interview" in PeopleAdmin.
Evaluate all Interviewees
Complete Evaluation Form
When final candidate is selected, recommend them for hire.
Move candidate to "Recommended for Hire" in PeopleAdmin
System will automatically notify HR, who will complete background check.
If and when background check clears, extend an offer to the candidate.
Close the Search
Within 30 days, submit search documents to HR.
Documents to submit:
-Screening Grid
-Reference Questions and Answers
-Interview Questions and Answers
-Skype Evaluation Forms (if applicable)
-Candidate Evaluation Forms
-Completed Background Check Consent Form

Process Flow Chart 3B: Hiring Process (Student-PT)


Hiring Manager screens applicants for the posting and determines who meets the minimum qualifications for the position
Move candidates to "Eligible for Hire" in PeopleAdmin
HR representative will check to make sure that student is enrolled in enough classes.
Is student enrolled in enough classes?
No
Yes
HR representative will move them to "Not selected for campus interview" in PeopleAdmin
HR representative will move to "Selected for campus interview" in PeopleAdmin
Hiring Manager conducts interviews with candidates
After evaluating interview results, decide who to hire and moves them in PeopleAdmin
Hired?
No
Yes
Move candidates to "Campus interview, not hired" in PeopleAdmin
Move candidate to "Initiate reference check" in PeopleAdmin
Immediately after moving to reference check, direct new hire to New Employee Orientation page on HR website
New hire completes all paperwork and takes new employee packet to HR
HR representative moves individual to hired and closes the position.
Background checks are conducted after new employee packets are turned in.